

Historic, Archive Document

Do not assume content reflects current scientific knowledge, policies, or practices.



United States
Department of
Agriculture

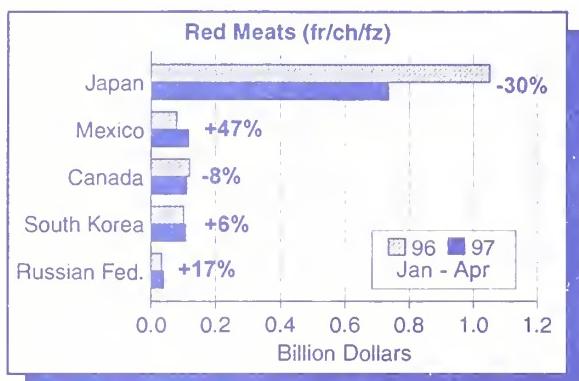
Foreign
Agricultural
Service

Circular Series

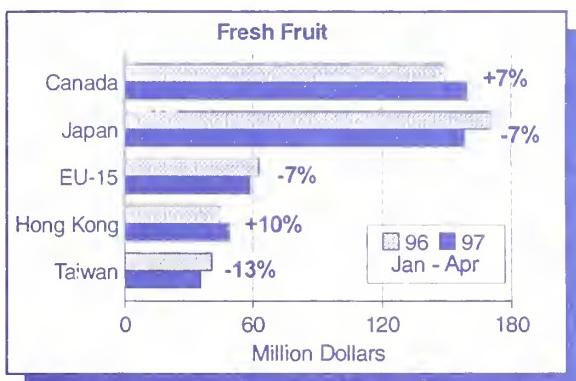
ATH 6 97
June 1997

Agricultural Trade Highlights

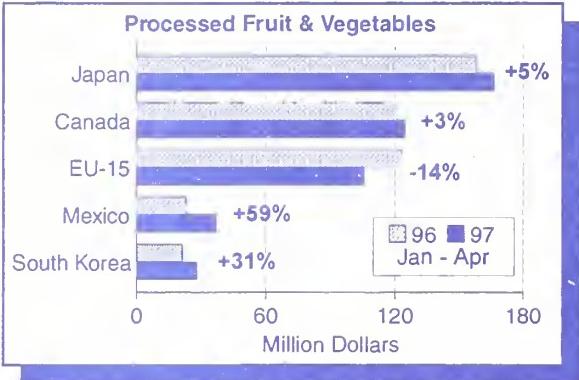
Consumer Food Trade Trends . . .



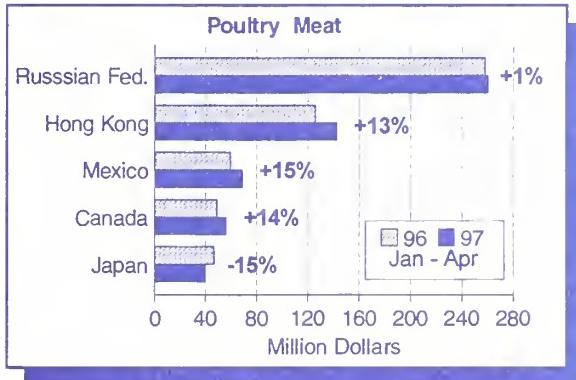
Top Five Markets



Processed Fruit & Vegetables



Poultry Meat



Shanghai Feature Issue Inside!

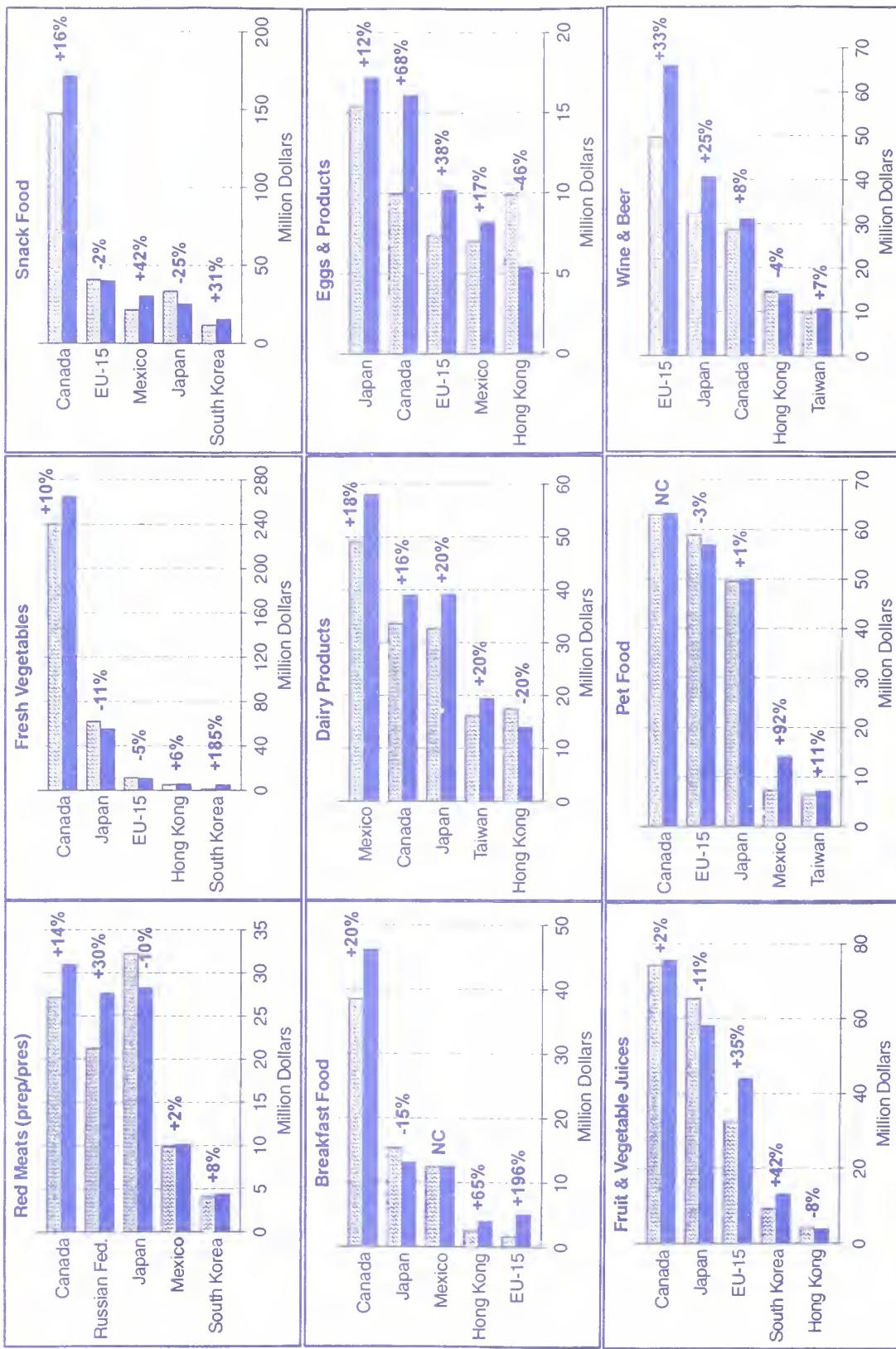
| | Page |
|--------------------------------------|------|
| Consumer Food Trade Trends | 2 |
| Consumer Food Highlights | 3 |
| Shanghai Feature | |
| City Spotlight | 5 |
| Food & Hotel China '97 | 10 |
| China Market Preview | 12 |

| | Page |
|---|------|
| US Agricultural Exports | |
| By Region | 22 |
| By Commodity Group | 23 |
| US Ag, Fish, & Wood Summaries | 24 |
| Foreign Exchange Rates | 25 |
| USDA Trade Show Calendar | 26 |

Top Five Markets for Selected U.S. Consumer Foods

January - April Comparisons

CY 96 CY 97



Note: Percentages are computed as the change from 1996 to 1997.

Consumer Food Highlights

U.S. consumer food exports for January through April 1997 were \$6.5 billion, nearly unchanged from the same period in 1996. Shipments to the top ranked market, Japan, were 17 percent lower this year compared to last year. Sales to Canada rose 9 percent while sales to Russia were off by 4 percent compared to the same time period last year. On a product basis, consumer food export growth was broad-based with 12 of 16 consumer food product categories showing at least a 5 percent increase.

Exports of *snack foods* for January through April 1997 reached \$391 million, an increase of 8 percent over the same time period in 1996. Sales to Canada, the market leader, were \$171 million, up 16 percent. Exports to the UK were \$12.5 million so far this year compared to \$5 million in 1996, up 146 percent. Shipments to Mexico rose to \$31 million, up 42 percent over the same period last year. Other markets with high percentage export growth rates this year were: Peru (up 74 percent); Venezuela (up 57 percent); Malaysia (up 53 percent) and Germany (up 50 percent).

Exports of *breakfast cereals & pancake mix* for January through April 1997 reached \$114 million, up 8 percent. Sales to Canada, the largest market, rose 20 percent to \$46 million. Shipments to the EU rose sharply by 196 percent to reach \$5 million. Exports to Japan reached \$13 million, off 15 percent. Israel and Hong Kong emerged as high growth markets this year, with sales rising 83 percent and 65 percent respectively.

Exports of *chilled, fresh, and frozen red meats* reached \$1.26 billion in the first four months of 1997, down 18 percent compared to the same period last year. A continued slump in sales to Japan (\$737 million, off 30 percent) offset increases in shipments to Mexico (\$117 million, up 47 percent), Korea (\$109 million, up 6 percent), Hong Kong (\$35 million, up 12 percent) and Russia (\$40 million, up 17 percent). Japan's share as a total of U.S. red meat exports has dropped to 59 percent from its record high of 68 percent in the same time period in 1996. China and Hong Kong now account for 3 percent of U.S. red meat exports, reaching \$37 million, up 15 percent. Sales to Brazil have risen to \$5.9 million, up 318 percent.

Exports of *poultry meat* reached \$758 million in the first four months of 1997, up 3 percent over the same period last year. Russia continues to dominate U.S. poultry sales, accounting for 34 percent of exports. Shipments so far this year reached \$261 million, however the growth rate was a flat 1 percent. Strong growth continued in the

second largest U.S. market, Hong Kong, where exports reached \$143 million, up 13 percent. Russia, Hong Kong and China account for 55 percent of total U.S. poultry exports. In other markets, shipments continued to rise to Mexico (\$69 million, up 15 percent) and Canada (\$56 million, up 14 percent), while falling to Japan (\$40 million, down 15 percent). Competition has increased in the Japanese poultry market among the major players China, Thailand, and the United States.

Exports of *dairy products* for the first 4 months of 1997 reached \$276 million, up 11 percent compared with the same period last year. The top four markets, Mexico, Canada, Japan and Taiwan account for more than 50 percent of all dairy exports. Mexico is the leading market for dairy exports, accounting for 21 percent or \$58 million in shipments.

Exports of *fresh vegetables* for January through April 1997 reached \$376 million, up eight percent over the same period last year. Canada accounts for 71 percent of fresh vegetable exports, with sales of \$265 million, up 10 percent so far this year. In the second largest market, Japan, shipments fell 11 percent to \$55 million. Exports also declined to Mexico, falling 13 percent to \$4.7 million. Countering those declines were increased shipments to Hong Kong (up 6 percent, \$6 million), Korea (up 185 percent, \$5.3 million) and the UK (up 11 percent, \$7 million).

Exports of *eggs and products* for the first four months of this year reached \$74 million, up 17 percent over the same period in 1996. At \$17 million Japan is the leading market, accounting for 23 percent of U.S. export sales. Topping last year's record setting pace, shipments to Canada rose 68 percent to reach \$16 million. Sales to Hong Kong fell to \$5.4 million, off 46 percent, while sales to Mexico rose to \$8.2 million. The most notable change in markets was a surge in sales to Russia, where an annual export record has already been set. Sales for the first four months of this year were \$3 million, up 328 percent over last year.

...Consumer Food Highlights

Exports of *fruit and vegetable juices* in the first third of 1997 reached \$235 million, up 5 percent over the same period last year. With \$75 million in sales Canada is the leading export market accounting for 32 percent of juice shipments. Sales to Japan fell 11 percent to \$58 million, while sales to South Korea increased 42 percent to \$13 million. Shipments to the EU rose sharply, up 35 percent to \$44 million. At the current rate, sales of juices to the EU could exceed the 1995 annual record. U.S. exports of juice are highly concentrated with Canada, Japan and the EU accounting for 76 percent of total shipments.

Exports of *pet food* in the first four months of 1997 reached \$237 million, up 8 percent over the same period a year ago. Canada and Japan account for half of U.S. pet food exports. Export growth to both of those markets was flat, at \$63 million and \$50 million respectively. Sales to the EU fell 3 percent to \$57 million. Strong growth was recorded to the Latin American markets of Mexico (\$14 million, up 92 percent), Argentina (\$4.2 million, up 45 percent), Brazil (\$5 million, up 156 percent), and Chile (\$2.4 million, up 41 percent).

Exports of *wine and beer* were \$217 million for the first third of 1997, up 9 percent compared with the same period last year. Exports were evenly split between wine and beer, however beer exports fell 7 percent to \$110 million while wine exports rose 29 percent. Shipments to the leading market for wine and beer, the EU, rose 33 percent to \$66 million. Sales to the largest country market, Japan, rose 25 percent to \$41 million. After a two year decline, exports to Mexico have rebounded to \$8 million, up 82 percent.

Exports of *prepared/preserved red meats* in the first four months of 1997 reached \$127 million, up 15 percent compared with the same period last year. Canada, Japan and Russia account for more than two thirds of all shipments. Sales to Canada and Russia rose 14 and 30 percent respectively, while falling 10 percent to Japan. Shipments to Hong Kong have jumped by 131 percent to reach \$5 million.

Exports of *fresh fruit* for the first four months of 1997 reached \$595 million, virtually unchanged from the same period last year. Canada and Japan account for more than 53 percent of sales, with shipments rising 7 percent and falling 7 percent respectively. Fresh fruit sales to the EU fell 7 percent to \$49 million. Counteracting those declines, exports rose to Hong Kong (\$49 million, up 10

percent), Indonesia (\$15 million, up 25 percent), Philippines (\$8 million, up 22 percent) and Malaysia (\$13 million, up 55 percent).

Export of *processed fruit & vegetables* reached \$658 million in January through April this year, up 9 percent over the same period last year. Nearly one quarter of all sales went to Japan, where shipments rose 5 percent to reach \$166 million. There was strong sales growth to Asia; exports rose to Hong Kong (up 18 percent, \$28 million), South Korea (up 31 percent, \$28 million), Taiwan (up 42 percent, \$24 million), Philippines (up 35 percent, \$14 million), Singapore (up 38 percent, \$14 million), Malaysia (up 39 percent, \$5.6 million) and Indonesia (up 21 percent, \$ 4.6 million). Exports have also risen to Brazil, up 514 percent to \$14.5 million.

Exports of *tree nuts* in the first four months of this year reached \$317 million, down 12 percent from the same time period last year. The fall was largely due to a 16 percent decline in sales to the EU. Shipments to Japan, rose 5 percent to \$55 million. Sales also fell to Canada, (down 9 percent, \$22 million), Hong Kong (down 4 percent, \$16 million) and Israel (down 35 percent, \$6.8 million).

Exports of *nursery products & cut flowers* in January through April 1997 reached \$91 million, up 11 percent over the same time period last year. More than half of the shipments went to Canada with sales reaching \$48 million, up 10 percent. Exports to the EU were up 8 percent reaching \$25 million. Sales to Japan were \$3.9 million, up 15 percent.

For more information, contact Robert Tse at (202) 720-1034 or by e-mail at tse@fas.usda.gov.

Retrieve individual product BICO tables at http://www.fas.usda.gov/scripts/bico/bico_frm.idc.

Shanghai City Spotlight

Shanghai is rapidly regaining its place as one of Asia's leading industrial and economic centers and is the gateway to eastern China's 200 million consumers. Besides Shanghai, eastern China includes the provinces of Jiangsu, Zhejiang and Anhui. These provinces include the cities of Nanjing, Hefei and Hangzhou. As living standards continue to improve among Shanghai's 16 million residents, demand for consumer food products is also on the rise. The Shanghai market presents huge opportunities for food and specialty product suppliers.

In 1996, U.S. consumer food exports to China reached a record \$900 million, if Hong Kong re-exports are included. This makes China the seventh largest market for U.S. consumer food exports. Overall U.S. agricultural shipments to China exceeded \$3.0 billion, with \$2.2 billion in direct exports and about \$800 million re-exported via Hong Kong.

The New "Middle Class"

Reliable and consistent income statistics are hard to come by in China due to the suspected large amount of unreported black market trading. As a result, most official income statistics are undervalued. According to A Statistical Survey of China, 1997, for example, the average national annual income for 1996 was 4845 RMB (approximately US \$585) for urban residents and 1926 RMB (approximately US \$232) for rural residents. In the larger Chinese cities, 1996 official salaries were even higher.

On the other hand, unofficial sources present a more optimistic outlook. Some reports indicate that 100 million persons in China's coastal urban provinces have a purchasing power parity annual income of US \$10,000 to \$40,000. In addition, it is estimated that China's growing middle class could reach 445-580 million by the year 2005.

While there is no real consensus regarding the definition of the "Chinese middle class," demographic segments are becoming more pronounced. If a monthly household income of 2000 RMB (approximately US \$241) is used as a dividing point (which according to a Shanghai survey accounts for about the upper 30 percent of households in Shanghai), China's middle class has the following characteristics:

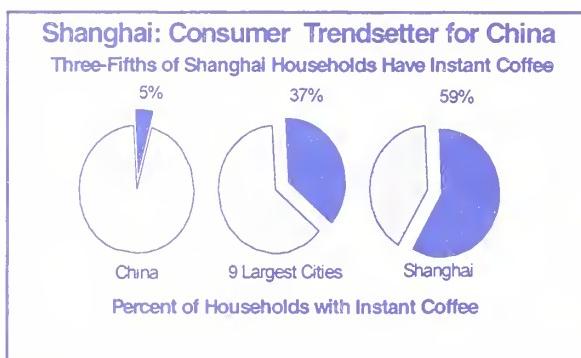
- Married with one child
- 36 - 45 years old
- College graduate
- Professional, such as a professor or technician

Shanghai Income is 70 Percent Greater than National Average



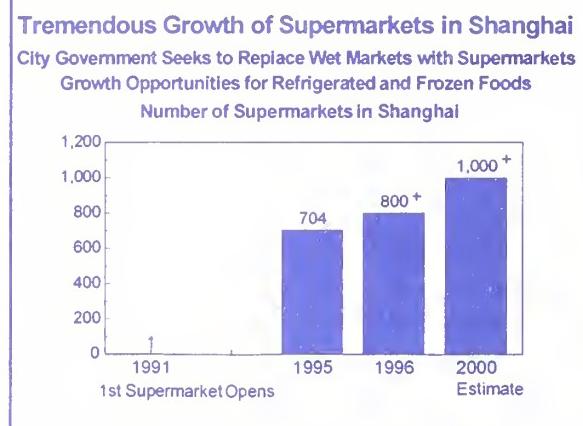
...Shanghai City

When it comes to food and beverage items found in the home, Shanghai residents have much greater variety as compared with other urban and rural areas within China. For example, only 5 percent of Chinese households nationally have instant coffee on hand. But more than a third of households (37 percent) in the nine largest cities typically have coffee in their homes. In the highest-income homes, such as those found in Shanghai, the percentage increases to six in ten (59 percent). Dairy products and soft drinks reflect similar upward trends in Shanghai by comparison. While products such as American beef represent an untapped market in Shanghai, consumer education and greater marketing efforts may help increase consumption.



of the entire distribution chain, including large state-run food conglomerates such as the Shanghai Food Group.

A Shanghai city government five-year plan is currently underway to phase out wet markets and provide incentives to supermarkets so that they become the primary food retailing points in the city. The city government also requires new stores to have produce and meat sections as well as refrigeration and freezer space.



Western Style Supermarkets vs. Wet Markets

In Shanghai, as in other parts of China, the most popular grocery outlets today are still outdoor street markets, also known as wet markets. Consumers shop daily in the wet market, which is usually within a ten minute walk from home. There they can buy fresh fruit and vegetables, fresh fish and seafood, fresh meats, and poultry products. Shopping with such frequency, Shanghai consumers continue to exhibit a "buy little, buy often" mentality.

Though Shanghai prices are generally lower in the wet market, the popularity of Western-style supermarkets is rapidly increasing. The first supermarket opened in Shanghai in 1991. But by 1996, the total number of supermarkets operating in Shanghai numbered 800 and belonged to more than 25 different supermarket companies.

Joint venture retailers such as Carrefour, Yaohan, Park'N Shop, and Metro are driving the sophistication

Food Costs

In Shanghai, food costs typically account for the greatest portion of household expenses. As most Chinese nationals pay only nominal fees for housing, more than half (51 percent) of the households spend 41 percent or more of their monthly income on groceries. According to a 1995 survey, average households spend approximately 700 RMB (US \$84) per month on food purchases.

Also important is the distinction between Chinese and non-Chinese food products. Although certain forms of Western foods such as fast food, snack foods, and beverages are being widely accepted especially by the younger generation, the staple meals eaten especially at breakfast and dinner by most Chinese are still predominantly Chinese foods. Chinese foods, in their current style of preparation, do not use a great variety of food ingredients.

...Shanghai City

Shanghai consumers spend more on meats than on any other grocery items. On average, meat expenses account for about 38 percent of the total grocery bill. The second most costly grocery item is vegetables (29 percent), followed by fruits (14 percent), breakfast foods (10 percent) and snacks (9 percent).



In China the price for imported foods is generally higher than domestic foods. The Chinese generally prefer local product, however imported food products are considered high in quality and price. Popular imported foods include candies, biscuits, coffee, milk powder and nuts. Bananas are the most popular imported fresh fruit while imported apples, grapes and mangos are also popular choices.

At the supermarket, Shanghai consumers purchase mostly frozen products and dry goods. For example, frozen Chinese dumplings and frozen chicken products are often purchased from the supermarket. In addition, snacks, crackers and instant noodles sell well in supermarkets.

Many supermarkets have a growing variety of frozen and chilled foods including cheeses, fruits, tray-wrapped meats, vegetables, and other chilled items. Western-style supermarkets have the largest refrigerated space. Refrigeration is rarely found in wet market stalls and state-run grocery stores have limited refrigerated display cases. Fast changing retail trends will continue to place an even greater emphasis on frozen, chilled and fresh food products.

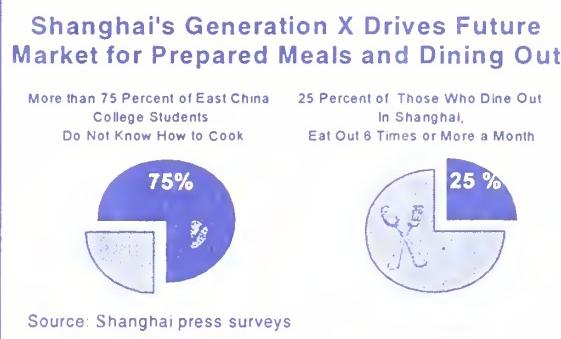
A recent innovation has been the appearance of chilled or frozen ready-to-wok meals. These meals consist of

pre-cut meats, vegetables and gravy. By cutting out the preparation time for traditional Chinese dishes, the busy dual-income Shanghai household can have a home cooked meal in minutes. Although "ready-to-wok" meals cost more, their presence in supermarkets reflects the growing value of time and convenience to Shanghai's increasingly affluent middle class.

Restaurants and Dining Trends

Surveys of both male and female college students in East China (who later become the highest wage-earners) show that less than 25 percent know how to cook. Most, due to housing shortages and high rents, will continue to live with their parents until marriage. China, since 1949, has actively promoted the dual-income household, and the one-child policy creates an even greater surplus income. More and more young people in East China are going to work for foreign enterprises, which puts great demands on time. Simply put, among middle class Chinese there is little time left for cooking. Dining out, therefore, has become an attractive option for those with rising incomes.

When asked to describe the occasion for their last restaurant visit, leisure is typically the most common response from Shanghai consumers. This indicates a lifestyle change as dining out used to be event driven (business meetings, weddings, etc.). Regarding frequency, about half never go out in a typical month. There is, however, a segment (which accounts for 25 percent of Shanghai's restaurant patrons) that dines out six times or more in a given month. Gender also plays a significant role with regard to frequency of dining out. Male respondents age 25 to 36 tend to eat out.



...Shanghai City

More specifically, males are more likely to engage in business dinners, while females are more likely to eat out for leisure.

Western restaurants typically are not Shanghai consumers' top choice. Consumers are unaccustomed to the taste of Western-style foods. Chinese also perceive the cost of Western restaurants to be higher than local Chinese restaurants. This perception, while not always true, can discourage consumers from visiting Western restaurants. As a result, mid-sized local restaurants are most popular because they serve a formal meal at a reasonable price. On average, a Chinese meal of this type costs 69 RMB (approximately US \$8) per person.

Fast Food Restaurants

When it comes to fast food restaurants, Kentucky Fried Chicken leads the way with over 160 restaurants in the People's Republic. KFC is followed by McDonald's, Japan's MosBurger, and local chains such as California Fried Chicken, Ronghua Fried Chicken, and Hong Kong's Cafe de Coral. Chain restaurants are emerging led by Pizza Hut and Gino's. There is also a wide variety of Chinese fast food led by California Beef Noodle King and Doujiang Dawang. Japanese fast food is becoming ever more popular with shops such as Cilang, and one can expect that the next few years will bring in an even larger number of both familiar as well as new name establishments.

Aside from the "Western"-style fast food restaurants are fast food restaurants specializing in Chinese food. These, too, have experienced phenomenal growth, as consumers in East China make increasingly higher demands for sanitation and convenience.

Of consumers surveyed, those who "frequently" (3 or more times per month) consume fast food were nearly all between 17 and 33 years of age. Older consumers who responded that they frequently purchased fast food always qualified this by saying it was for their children. "Fried chicken is what my child eats. I take him to KFC whenever he wants, but I don't eat it myself," said one Shanghai cab driver. But recently two grandmothers were observed enjoying KFC fried chicken while feeding their grandson KFC mashed potatoes and gravy. Many in the older generation believe mashed potatoes and gravy to be very healthy for babies and

they use that excuse to enjoy the fried chicken themselves. No longer do children have to beg to go KFC.

Fast food restaurants appeal particularly to the young. Five year old children when asked, "What is your favorite restaurant?", often responded with, "McDonald's". The Happy Meal is alive in Shanghai. However, when the same question is asked to the children's thirty-something middle-class parents, KFC was the answer. After less than ten years of growth, a generation gap over favorite fast food restaurants may be developing in Shanghai.

Chain Restaurants

Another important category for U.S. food exporters to consider is chain restaurants. From the supply side, chain restaurants are in many ways similar to fast food restaurants: both use large amounts of specialized, standardized ingredients, and both need to establish brand recognition across a wide area. However, chain restaurants have more of a sit-down dining atmosphere, rather than the hurried fast food environment. Chain restaurants in Shanghai are dominated by Pizza Hut (30 restaurants in China), followed by Chalon, Hartz Chicken Buffet, Gino's Pasta-Cappuccino, and Swenson's.

Yuppie Hang Outs

Other popular Western-style restaurants include restaurant-bartype dining establishments. These have an international theme or menu and often attract the local "yuppie" crowd which includes local Shanghai and expatriates.

Malone's American Cafe, Hard Rock Cafe, Tony Roma's for Ribs, Paulaner Brauhaus, O'Mally's Irish Pub, Pasta Fresca, Viva El Popo Mexican Restaurant, Judy's Too, Buffalo Bill's Badlands Bar, Shanghai Sally's, Danny's Pub, Fest Brew House, The Manhattan, Di Di's, and New York New York are many of the highly frequented hang-outs which are setting the trend for new establishments to follow. Many offer live disc jockeys or local bands that mostly play cutting-edge popular music from Europe and the United States. Theme parties are often held such as Greco-Roman Toga night or Mardi Gras night. Many different nationalities can be found seven days a week

...Shanghai City

enjoying the distinctly Western party atmosphere. All of these establishments offer menus ranging from full meals to simple bar snacks. Ice cream is also a popular late night snack in the crowded bar scene.

Hotel Restaurants

Many four-and five-star hotels also offer restaurants of varying quality, styles and prices. For example, the Shanghai Hilton features DaVinci's, an upscale, pricey Italian fine dining establishment. The Westin New World and Equatorial Hotels also have authentic Italian restaurants run by Italian chefs.

The New Jin Jiang Hotel has fine Indian cuisine at its stylish Jin Jiang Bombay Tandoor Restaurant. The Olympic Hotel is the site of En Euro's which features German and Continental cuisine.

As the selection of restaurants continues to expand and improve in and around Shanghai, many Western hotels are losing their regular flow of restaurant patrons. To regain some of this once lucrative food and beverage business, many hotels host monthly promotions featuring Swiss fondue, Australian fare, Italian, Thai

Stampede '97 is Shanghai Success

The U.S. Agricultural Trade Office and the Shanghai Hilton recently co-hosted Stampede '97, an American foods extravaganza. This promotion was extremely successful and somewhat different from other local promotions in that it was much larger in scale and ran for twelve days. Stampede '97 had a total of 14 sponsors including the U.S. Meat Export Federation, the Alaska Seafood Marketing Institute, the Oregon Dungeness Crab Commission, the Western United States Agricultural Trade Association, the California Wine Institute, the Mid-America Trade Commission, Wild Turkey, Budweiser, Baskin-Robbins ice cream, and others. Alaskan seafood, U.S. beef, and California wines were some of the featured menu items. Two well-known American chefs greatly added to the promotion's success as did an American rock 'n roll band that played nightly in the hotel's main restaurant which was transformed into an American steak and seafood house.

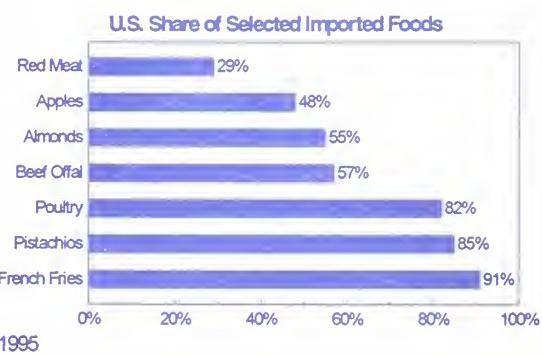
American beef, or other cultural delights. These promotions typically feature a guest chef, and often some form of ethnic entertainment.

Conclusion

Shanghai consumers clearly demonstrate some interesting characteristics that are unique to this populous nation. Per-capita income is higher in Shanghai than all other Chinese cities except Shenzhen. In addition, Shanghai's selection of food products, places to shop and eat are also well beyond the norm. While the first supermarket in Shanghai opened just six years ago, by the year 2000, the number of supermarkets will rise to about 1000. At a time when many parts of China have not yet seen the likes of a supermarket, large foreign-invested supermarkets such as Carrefour, Metro, Park'N Shop, and Yaohan are actively wooing Shanghai customers.

In conclusion, the Shanghai food market represents a variety of exciting opportunities and challenges for American food producers and exporters. As economic growth continues at a spectacular double-digit rate, Shanghai consumers will also expand their buying preferences. Thus doors will continue to open furthering opportunities for foreign food/beverage producers to market their products to Shanghai's quickly emerging middle class.

U.S. is Leading Source of Many of China's Imported High Value Products



Food and Hotel China '97

The 4th International Food, Drink, Supermarket, Hotel & Catering Equipment and Supplies Exhibition

August 26 - 29, 1997

Venue: Shanghai International Exhibition Centre - INTEX Shanghai.

U.S. exporters interested in the China market, particularly Shanghai, should consider attending Food & Hotel China'97 in Shanghai, China from August 26 - 29, 1997.

With rising incomes and improving standards of living, more than 100 million Chinese consumers can purchase imported food and beverages on a regular basis. Nowhere else in the world are there so many potential buyers of food and drink products. This fact coupled with increasing trade liberalization and deregulation means that China is the rising star for companies looking to increase their exports in the Asian region.

Food & Hotel China '97 promises to be the year's definitive meeting place for China's food, drink, and hospitality industry professionals. USDA's Foreign Agricultural Service endorsed this show and the ATO Shanghai will support exhibitors in the U.S. pavilion.

A Food & Hotel China '97 Preview Program is included in this issue of Trade Highlights.

For additional information about exhibiting at Food & Hotel China '97, contact:

Ellen Wong
Commerce Tours International
870 Market Street, Suite 918
San Francisco, CA 94102,
Tel: (415) 433-3072
Fax: (415) 433-2820

or Loh Wai Keong
The Montgomery Network
505 Block C, Shanghai Jia Hua Business Centre
Hong Qiao Road 808, Shanghai 200030, China
Tel: 86-21-6486-3266
Fax: 86-21-6486-4681

For information about USDA sponsored activities contact

United States Department of Agriculture
Foreign Agricultural Service
Heather Grell
Tel: 202-205-3771
Fax: 202-690-4374
E-mail:Grell@fas.usda.gov

USDA Agricultural Trade Office
Shanghai Center, Suite 331
Nanjing XiLu, Shanghai 200040
Tel: 86-21-6279-8622
Fax: 86-21-6279-8336
E-mail:Atos@public.sta.net.cn

Preview Program Schedule -- Food & Hotel China '97, Shanghai, China

Sunday, August 24th

1:00 pm to 4:00 pm -- *Making the Most of Your Export Efforts Seminar*

Host: U.S. Agricultural Trade Office Shanghai.

Venue: Coral Room, 3rd Level, Westin Tai Ping Yang Hotel.

This seminar is offered free of charge to all exhibitors of Food & Hotel China '97's American Pavilion. It is also open to American exporters visiting the show. Seminar speakers will provide detailed, practical information about exporting to China, consumer trends and preferences in Shanghai and Guangzhou, tips for working the trade show, plus updated

...Food and Hotel China '97

importer lists and research reports on a variety of topics including the Chinese food labeling law. The session will conclude with an optional visit to local supermarkets.

Monday, August 25th

8:30 am to 10:30 am -- *Exhibitor Breakfast Briefing*

Host: Commerce Tours.

Venue: To be announced.

This breakfast briefing is open to all exhibitors of Food & Hotel China '97's American Pavilion and will offer information regarding rules of the show, booth set-up, and general information about the local market.

Tuesday, August 26th

-- *Food & Hotel China '97 Official Opening.*

Venue: Shanghai International Exhibition Centre - INTEX Shanghai.

Wednesday, August 27th

9:00 am - 5:00 pm -- *American foods seminars on U.S. consumer-ready food products conducted by the United States Department of Agriculture, co-sponsored by the State of California and the Western United States Agricultural Trade Association.* The target attendees for these seminars are Chinese traders, retailers, and distributors.

Venue: Pacific Room, 3rd Level, Westin Tai Ping Yang Hotel.

9:00 - 11:00 am *Financing Food Exports*

What both buyers and sellers need to know regarding financing and payment alternatives in international trade including USDA export credit guarantee programs/supplier credits and the private banking perspective.

1:30 - 3:00 pm *Distribution and Handling of Fresh Fruits and Vegetables*

Retail handling including back room preparation and in-store promotion and display.

3:30 - 5:00 pm *Cold Chain Maintenance*

Assuring safety and quality control in frozen and refrigerated consumer food products (product grades and standards, labeling and nutrition information, packaging, more efficient transportation and storage of frozen products, selection and maintenance of refrigeration/freezing equipment).

Thursday, August 28th

6:30 pm - 9:00 pm -- *U.S. Agricultural Trade Office Reception, By Invitation Only*

(Interested U.S. exporters may contact ATO Shanghai for information.)

For Shanghai trade contacts and exhibitors at the American Pavilion.

Venue: Cypress Garden Hotel.

Friday, August 29th

Afternoon -- Booth tear down.

Final day of Food & Hotel China '97.

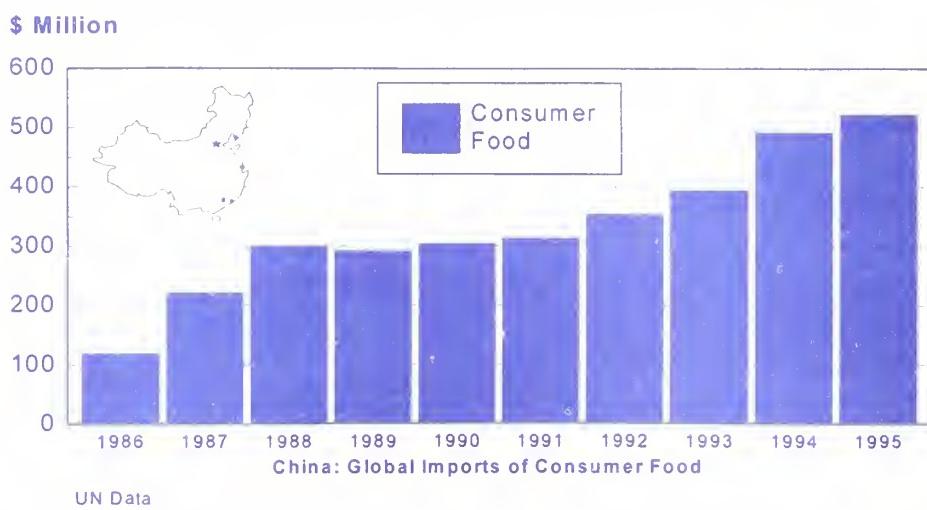
The U.S. Agricultural Trade Office will have an office set up from Sunday, August 24 through Friday, August 29 in the Coral Room, 3rd floor of the Westin Hotel.

Food & Hotel China '97 Market Preview

Food & Hotel China '97 Market Preview



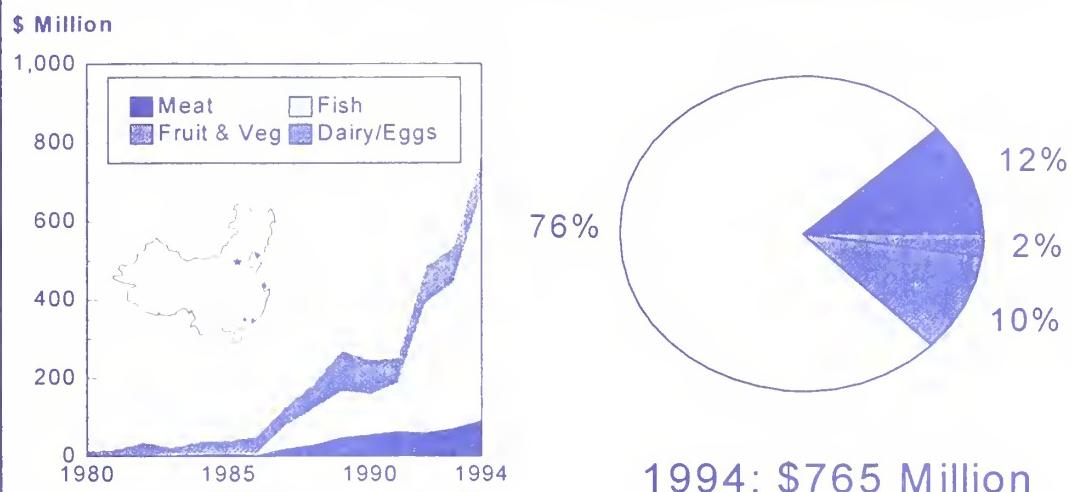
China's Imports of Consumer Food Increase 344 Percent in a Decade



...Food & Hotel China '97 Market Preview

Growing Trade in Imported Refrigerated Products

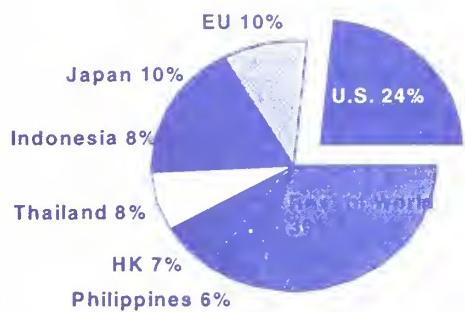
Composition of China's Refrigerated Product Imports



Total U.S. Consumer Food Shipments Makes China 7th Largest Market

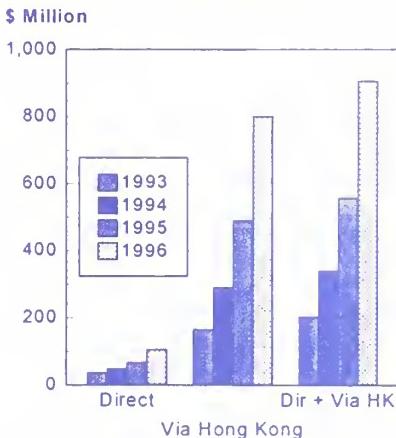
Most Shipments Enter Via Hong Kong

U.S. is Leading Source of China's Consumer Food Imports



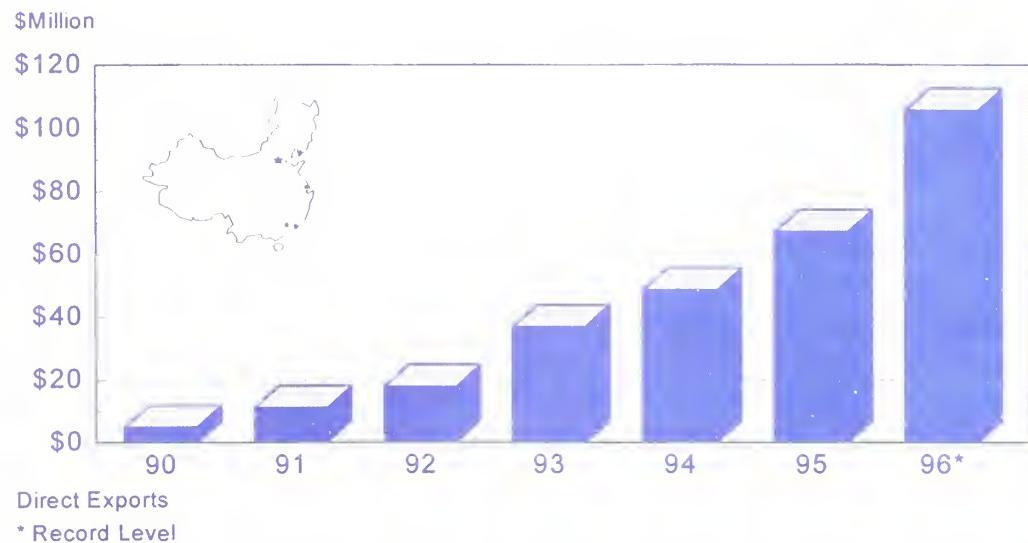
Source: 1995 UN Data

U.S. Consumer Food Exports to China Approach \$Billion Level

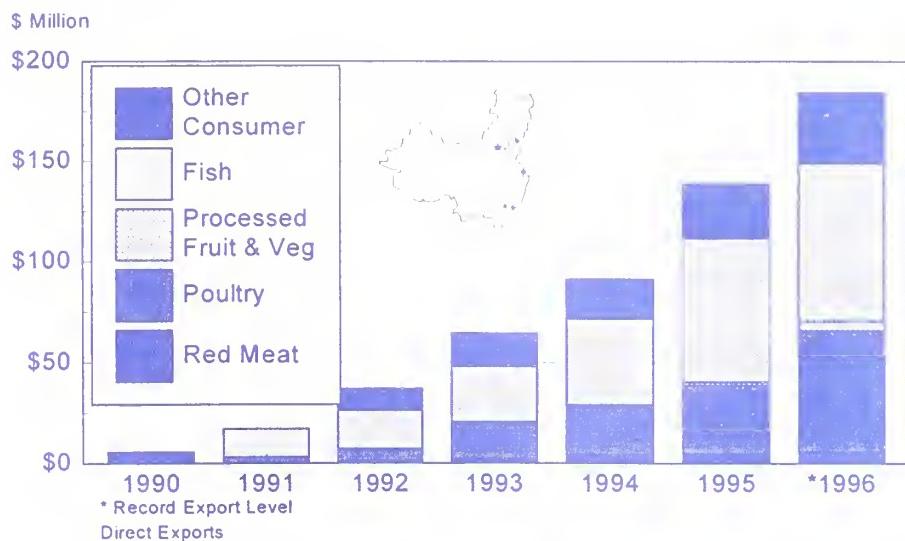


...Food & Hotel China '97 Market Preview

U.S. Consumer Food Exports to China Continue Rising

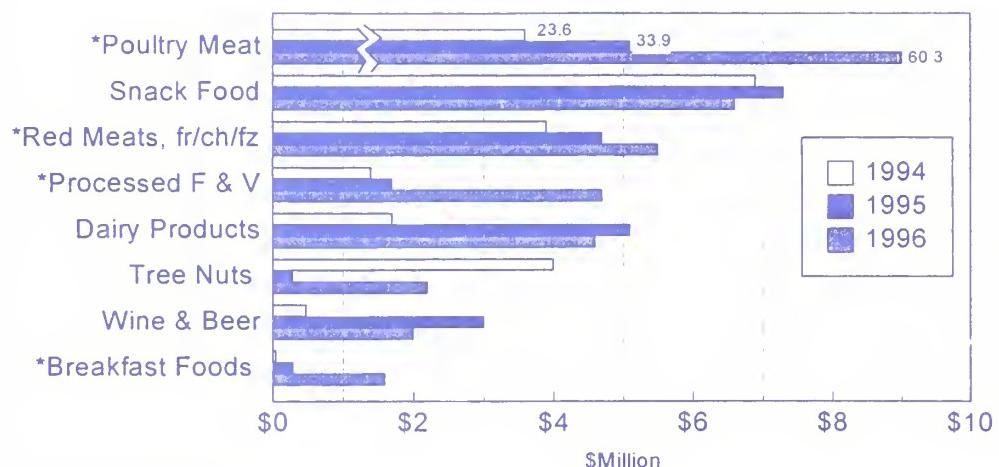


U.S. Exports of Consumer Food and Fish to China Most Products Are in Four Categories and Are Refrigerated



...Food & Hotel China '97 Market Preview

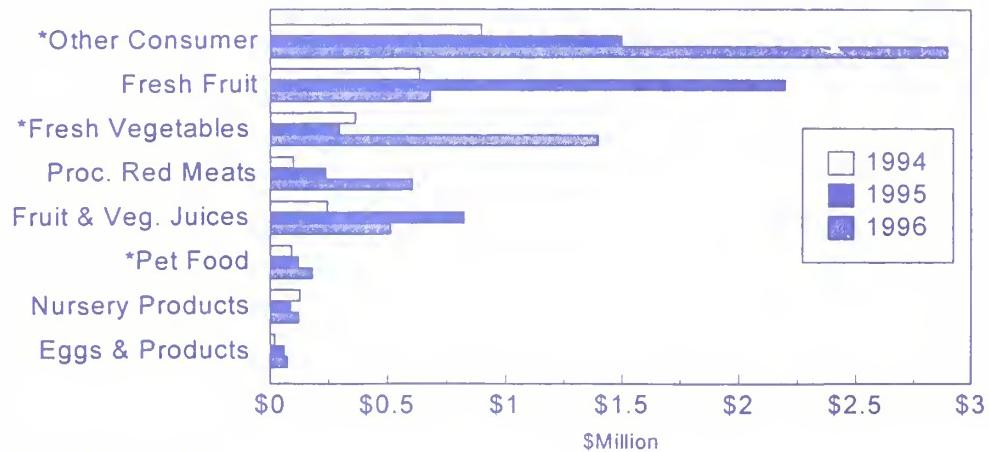
U.S. Consumer Food Exports to China Consumer Food Trend 94-96



Direct Exports Only

* Record Export Level

U.S. Consumer Food Exports to China Consumer Food Trend 94-96

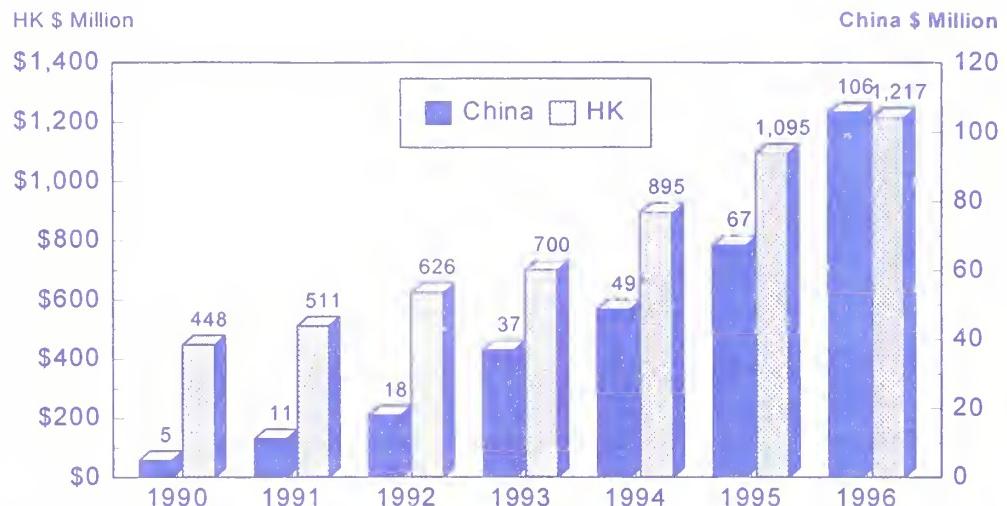


Direct Exports Only

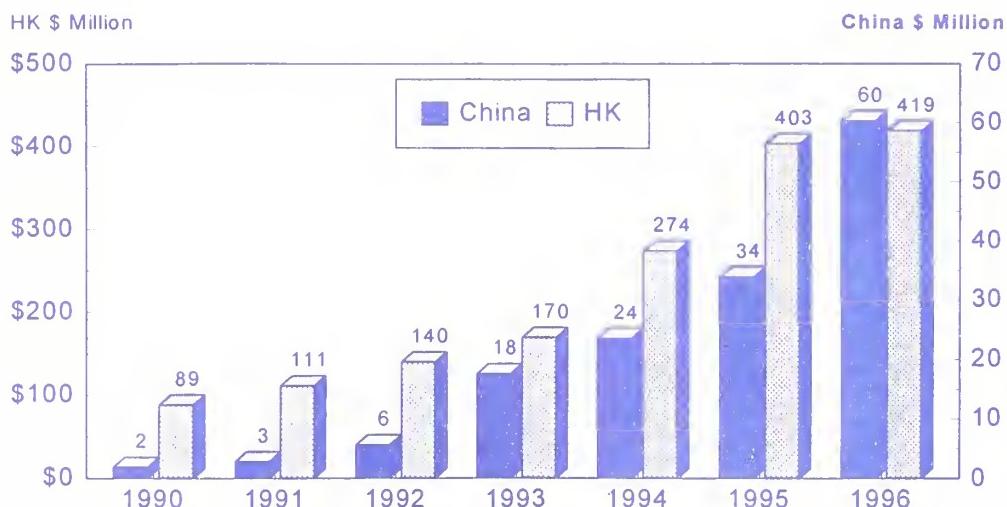
* Record Export Level

...Food & Hotel China '97 Market Preview

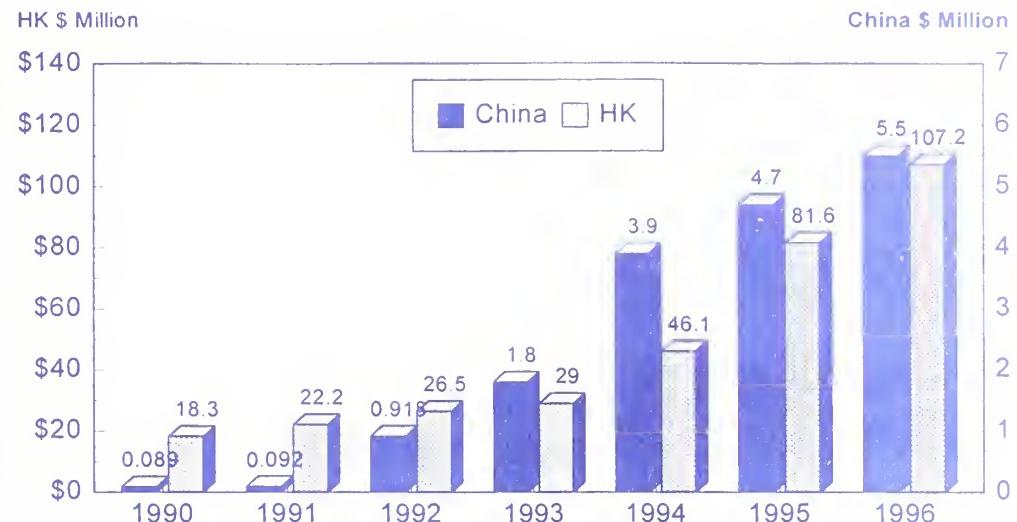
U.S. Exports to China & Hong Kong Consumer Food Trend 1990-96



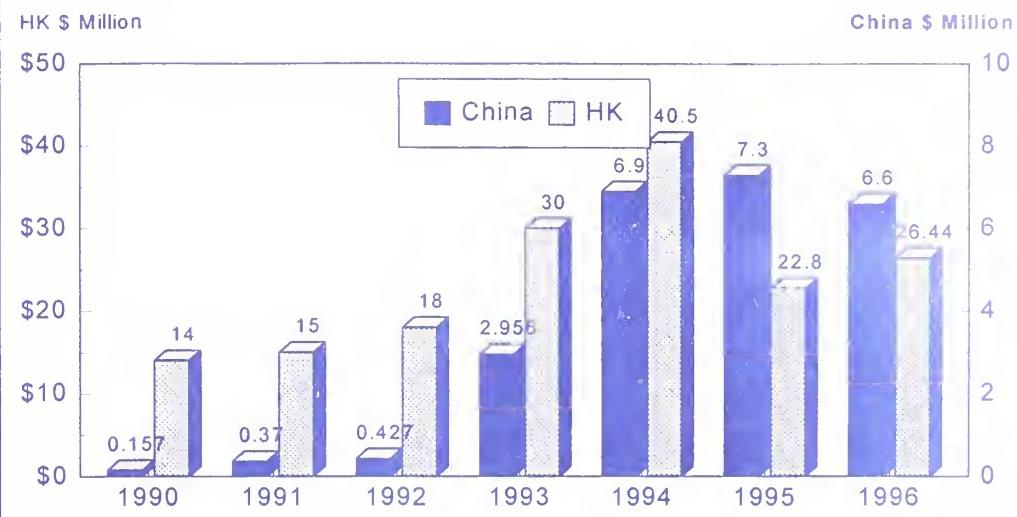
U.S. Exports to China & Hong Kong Poultry Trend 1990-96



U.S. Exports to China & Hong Kong Red Meat Trend 1990-96



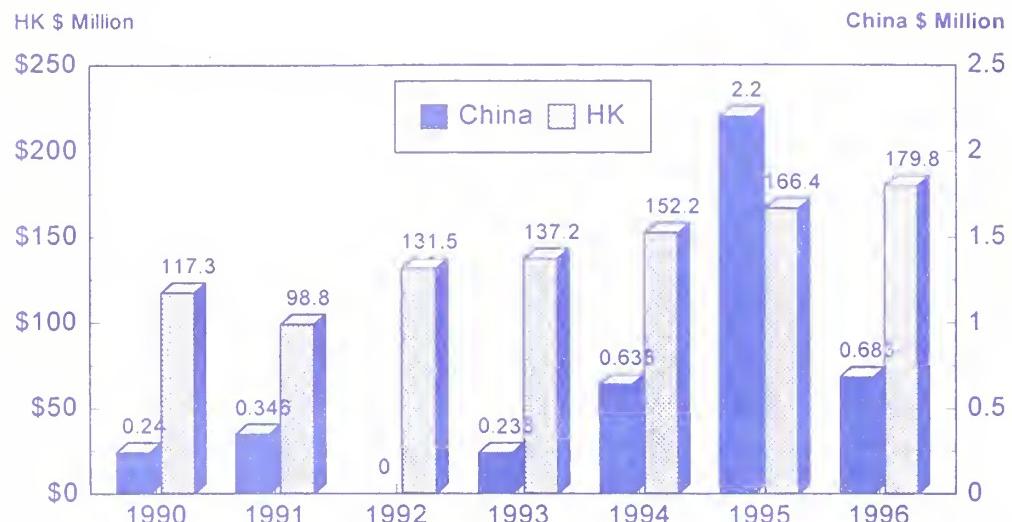
U.S. Exports to China & Hong Kong Snack Food Trend 1990-96



...Food & Hotel China '97 Market Preview

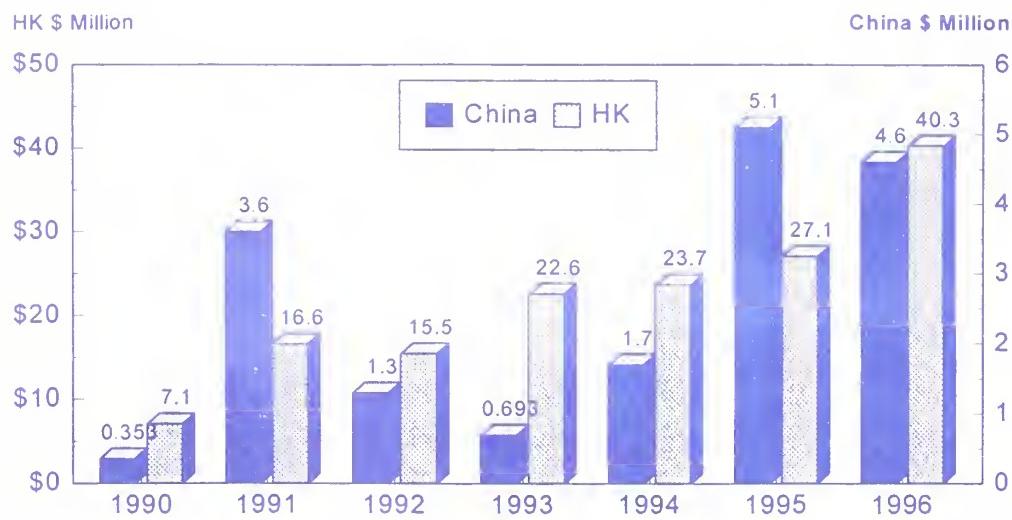
U.S. Exports to China & Hong Kong

Fresh Fruit Trend 1990-96



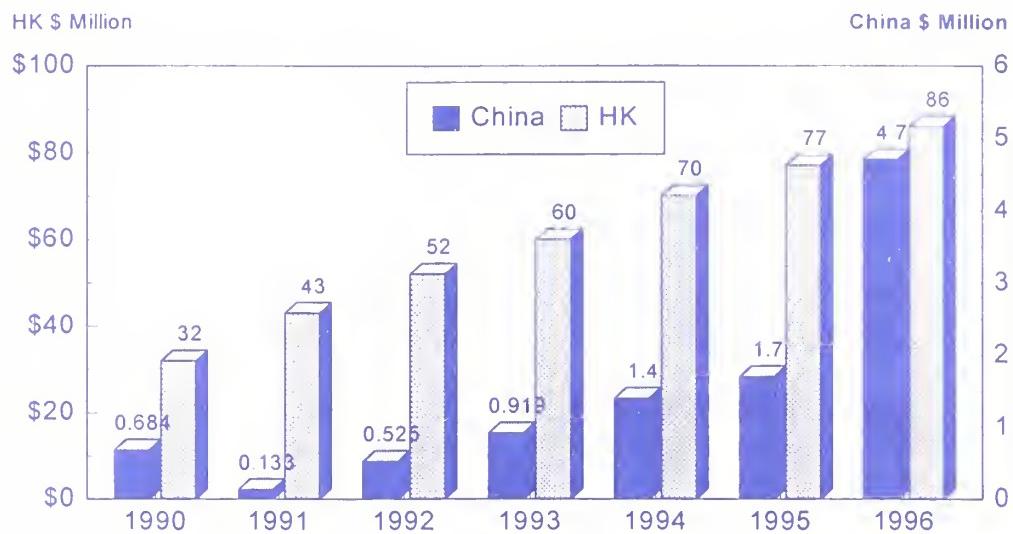
U.S. Exports to China & Hong Kong

Dairy Trend 1990-96

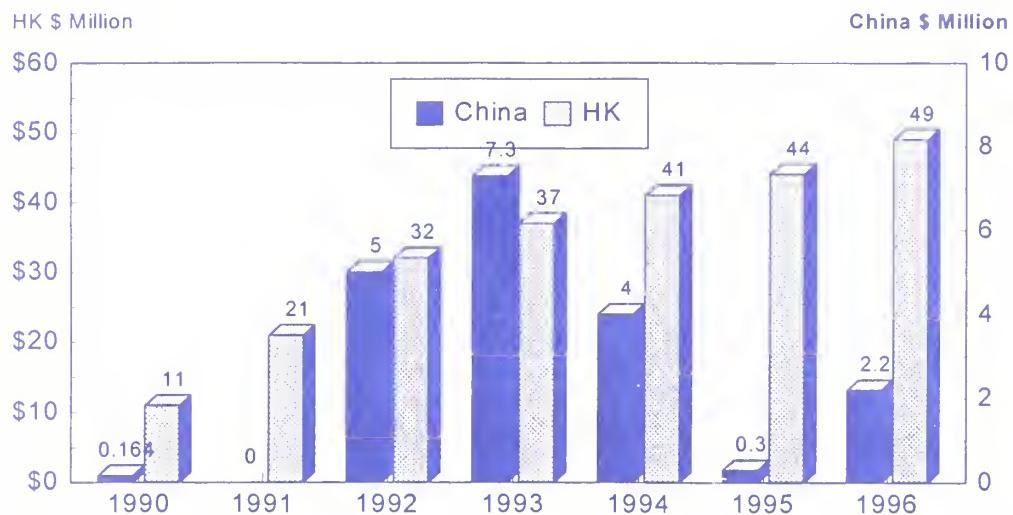


...Food & Hotel China '97 Market Preview

U.S. Exports to China & Hong Kong Processed Fruit & Vegetables Trend 1990-96

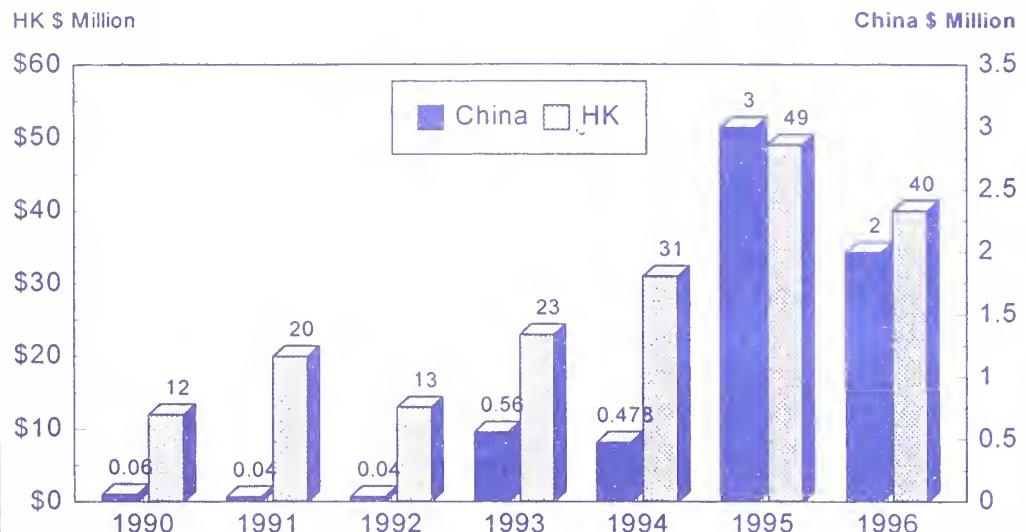


U.S. Exports to China & Hong Kong Tree Nuts Trend 1990-96

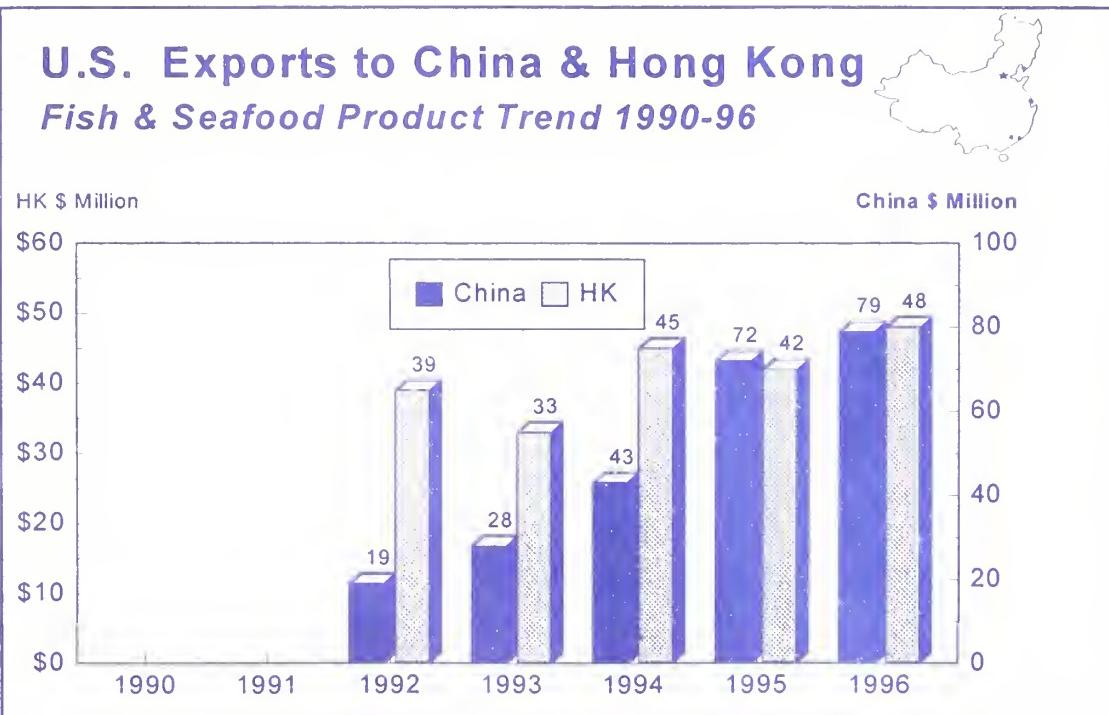


...Food & Hotel China '97 Market Preview

U.S. Exports to China & Hong Kong Beer & Wine Trend 1990-96



U.S. Exports to China & Hong Kong Fish & Seafood Product Trend 1990-96



The China Market

Where To Turn For Assistance

- USDA/FAS, State Departments of Agriculture, Regional Trade Groups, Cooperators
- FAS Web Site:
<http://www.fas.usda.gov>
- ATO Shanghai Web Site:
<http://www.redfish.com/ATOS/>
- ATO Hong Kong Web Site:
http://www.usia.gov/posts/hong_kong.html
- ATO Taipei Web Site:
<http://ait.org.tw/ait/AGRI/ato.htm>
- FAS Export Action Kit (For New Exporters)
(202) 720-7103 To Request Kit
- Trade Assistance Promotion Office
(202) 720-7103

Market Research Completed By ATO Shanghai/ATO Guangzhou from May 1996 - May 1997

General Articles

- Brand Management in China
- Business Travel in China
- Chinese Food Labeling Law
- Fast Food in Shanghai
- Shanghai Supermarkets: Overview and Trends
- Shanghai Supermarkets: What's for Sale
- Snack Foods in Shanghai
- Shanghai consumer Attitudes & Food Purchasing Habits



Specific Commodity Briefs

- Aquaculture in Southern China
- China's Apple market Update
- China's Seafood Market
- Forest Products in China
- Fruit & Vegetable Juices
- Poultry Annual
- Shanghai's Beer Market
- Shanghai's Chocolate Market
- Ostriches and Emus
- Turtles

To find or request these reports: Check the FAS or ATO Web Sites

U.S. Agricultural Export Value by Region

Monthly and Annual Performance Indicators

| | April | | | October-April | | | Fiscal Year | | |
|-------------------------------------|-----------------|-------|-------|-----------------|--------|------|-----------------|---------|------|
| | 1996 | 1997 | | FY '96 | FY '97 | | 1996 | 1997(f) | |
| | -- \$Billion -- | | Chg | -- \$Billion -- | | Chg | -- \$Billion -- | | Chg |
| Western Europe | 0.607 | 0.592 | -3% | 6.312 | 6.384 | 1% | 9.275 | 9.3 | 0% |
| European Union 1/ | 0.585 | 0.540 | -8% | 6.087 | 6.090 | 0% | 8.913 | 9.0 | 1% |
| Other Western Europe | 0.022 | 0.051 | 136% | 0.225 | 0.295 | 31% | 0.363 | 0.3 | -17% |
| Central & Eastern Europe | 0.034 | 0.013 | -63% | 0.247 | 0.222 | -10% | 0.399 | 0.4 | 0% |
| Former Soviet Union | 0.106 | 0.107 | 1% | 1.008 | 0.981 | -3% | 1.650 | 1.9 | 15% |
| Russian Federation | 0.095 | 0.100 | 5% | 0.729 | 0.788 | 8% | 1.235 | 1.5 | 21% |
| Asia | 2.388 | 2.119 | -11% | 16.334 | 15.463 | -5% | 25.959 | 24.3 | -6% |
| Japan | 1.143 | 1.025 | -10% | 7.198 | 6.664 | -7% | 11.873 | 11.4 | -4% |
| China | 0.127 | 0.132 | 4% | 1.335 | 1.358 | 2% | 1.816 | 2.0 | 10% |
| Other East Asia | 0.752 | 0.640 | -15% | 4.924 | 4.880 | -1% | 8.165 | 7.5 | -8% |
| Taiwan | 0.244 | 0.236 | -3% | 1.686 | 1.684 | -0% | 2.924 | 2.6 | -11% |
| South Korea | 0.355 | 0.270 | -24% | 2.320 | 2.254 | -3% | 3.710 | 3.3 | -11% |
| Hong Kong | 0.153 | 0.134 | -12% | 0.918 | 0.941 | 3% | 1.531 | 1.6 | 5% |
| Other Asia | 0.365 | 0.322 | -12% | 2.877 | 2.562 | -11% | 4.104 | 3.4 | -17% |
| Pakistan | 0.000 | 0.019 | 4063% | 0.291 | 0.259 | -11% | 0.394 | 0.3 | -24% |
| Philippines | 0.079 | 0.117 | 49% | 0.532 | 0.570 | 7% | 0.904 | 0.7 | -23% |
| Middle East | 0.241 | 0.231 | -4% | 1.685 | 1.465 | -13% | 2.537 | 2.1 | -17% |
| Israel | 0.047 | 0.055 | 17% | 0.378 | 0.350 | -7% | 0.626 | 0.5 | -20% |
| Saudi Arabia | 0.066 | 0.059 | -11% | 0.397 | 0.342 | -14% | 0.579 | 0.5 | -14% |
| Africa | 0.201 | 0.151 | -25% | 1.842 | 1.138 | -38% | 2.952 | 2.1 | -29% |
| North Africa | 0.133 | 0.096 | -28% | 1.296 | 0.685 | -47% | 2.071 | 1.4 | -32% |
| Egypt | 0.115 | 0.060 | -47% | 0.879 | 0.427 | -51% | 1.418 | 1.0 | -29% |
| Algeria | 0.005 | 0.033 | 528% | 0.200 | 0.149 | -26% | 0.313 | 0.3 | -4% |
| Sub-Saharan Africa | 0.068 | 0.055 | -19% | 0.546 | 0.453 | -17% | 0.881 | 0.7 | -21% |
| Latin America | 0.875 | 0.834 | -5% | 5.696 | 5.912 | 4% | 9.920 | 9.8 | -1% |
| Mexico | 0.500 | 0.453 | -9% | 2.827 | 2.978 | 5% | 5.005 | 5.5 | 10% |
| Other Latin America | 0.376 | 0.381 | 1% | 2.870 | 2.934 | 2% | 4.915 | 4.3 | -13% |
| Brazil | 0.035 | 0.019 | -46% | 0.310 | 0.288 | -7% | 0.577 | 0.5 | -13% |
| Venezuela | 0.031 | 0.050 | 62% | 0.248 | 0.331 | 33% | 0.446 | 0.4 | -10% |
| Canada | 0.500 | 0.564 | 13% | 3.381 | 3.758 | 11% | 5.988 | 6.2 | 4% |
| Oceania | 0.052 | 0.037 | -29% | 0.277 | 0.284 | 2% | 0.476 | 0.4 | -16% |
| World Total | 5.100 | 4.654 | -9% | 37.171 | 35.896 | -3% | 59.795 | 56.5 | -6% |

Note: 1/ EU-15 includes the newest member states of Austria, Finland and Sweden.

FY 1997 forecasts (f) are based on USDA's "Outlook for U.S. Agricultural Exports," published May 29, 1997.

U.S. Exports of Agricultural, Fish & Forest Products by Major Group

Monthly and Annual Performance Indicators

| Export Values | April | | | October-April | | | Fiscal Year | | |
|------------------------------|-----------------|--------|------|-----------------|--------|--------|-----------------|-------|---------|
| | 1996 | | 1997 | | FY '96 | FY '97 | | 1996 | 1997(f) |
| | -- \$Billion -- | | Chg | -- \$Billion -- | | Chg | -- \$Billion -- | | Chg |
| Grains and Feeds 1/ | 1.898 | 1.335 | -30% | 12.928 | 10.248 | -21% | 21.553 | 16.0 | -26% |
| Wheat & Flour | 0.531 | 0.325 | -39% | 3.977 | 2.284 | -43% | 7.032 | 3.8 | -46% |
| Rice | 0.095 | 0.084 | -11% | 0.636 | 0.662 | 4% | 1.004 | 1.0 | -0% |
| Coarse Grains 2/ | 0.904 | 0.556 | -39% | 5.813 | 4.746 | -18% | 9.338 | 6.9 | -26% |
| Corn | 0.843 | 0.483 | -43% | 5.204 | 4.215 | -19% | 8.369 | 6.1 | -27% |
| Feeds & Fodders | 0.240 | 0.240 | 0% | 1.605 | 1.602 | 0% | 2.627 | 2.6 | -1% |
| Oilseeds and Products | 0.701 | 0.901 | 28% | 6.539 | 8.314 | 27% | 9.670 | 10.8 | 12% |
| Soybeans | 0.426 | 0.506 | 19% | 4.391 | 5.468 | 25% | 6.312 | 7.0 | 11% |
| Soybean Cakes & Meals | 0.097 | 0.174 | 79% | 0.766 | 1.287 | 68% | 1.305 | 1.6 | 23% |
| Soybean Oil | 0.019 | 0.022 | 19% | 0.217 | 0.363 | 67% | 0.272 | 0.5 | 84% |
| Other Vegetable Oils | 0.071 | 0.077 | 9% | 0.568 | 0.470 | -17% | 0.836 | N/A | NA |
| Livestock Products | 0.824 | 0.681 | -17% | 4.902 | 4.408 | -10% | 8.067 | 8.3 | 3% |
| Beef, Pork & Variety Meats | 0.495 | 0.356 | -28% | 2.671 | 2.197 | -18% | 4.343 | 4.6 | 6% |
| Hides, Skins & Furs | 0.162 | 0.143 | -12% | 0.950 | 1.003 | 6% | 1.677 | 1.7 | 1% |
| Poultry Products | 0.200 | 0.206 | 3% | 1.556 | 1.694 | 9% | 2.730 | 2.9 | 6% |
| Poultry Meat | 0.169 | 0.175 | 4% | 1.345 | 1.460 | 9% | 2.353 | N/A | NA |
| Dairy Products | 0.065 | 0.079 | 22% | 0.425 | 0.439 | 3% | 0.719 | 0.7 | -3% |
| Unmanufactured Tobacco | 0.112 | 0.133 | 18% | 0.967 | 1.025 | 6% | 1.393 | 1.4 | 1% |
| Cotton and Linters | 0.234 | 0.268 | 15% | 2.546 | 1.815 | -29% | 3.028 | 2.8 | -8% |
| Planting Seeds | 0.052 | 0.064 | 23% | 0.513 | 0.660 | 29% | 0.727 | 0.9 | 24% |
| Horticultural Products | 0.840 | 0.832 | -1% | 5.741 | 6.141 | 7% | 10.019 | 10.6 | 6% |
| Sugar & Tropical Products | 0.172 | 0.156 | -10% | 1.052 | 1.150 | 9% | 1.886 | 2.1 | 11% |
| Forest Products 4/ | 0.578 | 0.619 | 7% | 4.071 | 4.430 | 9% | 7.060 | N/A | N/A |
| Fish and Seafood Products 4/ | 0.216 | 0.177 | -18% | 1.518 | 1.571 | 3% | 2.867 | N/A | N/A |
| Total Agriculture | 5.099 | 4.654 | -9% | 37.170 | 35.894 | -3% | 59.792 | 56.5 | -6% |
| Total Ag., Fish & Forest | 5.894 | 5.450 | -8% | 42.758 | 41.895 | -2% | 69.720 | N/A | N/A |
| Export Volumes | ---- MMT---- | | | ---- MMT---- | | | ---- MMT---- | | |
| Grains and Feeds 1/ | 9.478 | 7.595 | -20% | 69.607 | 58.257 | -16% | 110.130 | N/A | NA |
| Wheat | 2.457 | 1.829 | -26% | 19.270 | 12.532 | -35% | 33.716 | 21.5 | -36% |
| Wheat Flour | 0.048 | 0.024 | -49% | 0.265 | 0.280 | 6% | 0.470 | 0.6 | 28% |
| Rice | 0.295 | 0.236 | -20% | 1.820 | 1.737 | -5% | 2.831 | 2.5 | -12% |
| Coarse Grains 2/ | 5.378 | 4.190 | -22% | 39.041 | 34.936 | -11% | 58.656 | 52.8 | -10% |
| Corn | 5.035 | 3.618 | -28% | 35.104 | 30.902 | -12% | 52.681 | 46.5 | -12% |
| Feeds & Fodders | 1.109 | 1.136 | 2% | 7.769 | 7.361 | -5% | 12.065 | 12.2 | 1% |
| Oilseeds and Products | 2.118 | 2.442 | 15% | 21.461 | 26.103 | 22% | 30.759 | 33.3 | 8% |
| Soybeans | 1.439 | 1.584 | 10% | 16.002 | 19.226 | 20% | 22.372 | 24.1 | 8% |
| Soybean Cakes & Meals | 0.414 | 0.592 | 43% | 3.366 | 4.702 | 40% | 5.445 | 6.1 | 12% |
| Soybean Oil | 0.034 | 0.038 | 13% | 0.363 | 0.660 | 82% | 0.450 | 0.8 | 78% |
| Other Vegetable Oils | 0.098 | 0.119 | 22% | 0.789 | 0.706 | -11% | 1.146 | N/A | NA |
| Livestock Products 3/ | 0.354 | 0.303 | -14% | 2.212 | 1.799 | -19% | 3.791 | N/A | NA |
| Beef, Pork & Variety Meats | 0.157 | 0.120 | -24% | 0.842 | 0.748 | -11% | 1.410 | 1.5 | 6% |
| Poultry Products 3/ | 0.178 | 0.180 | 1% | 1.369 | 1.457 | 6% | 2.383 | N/A | NA |
| Poultry Meat | 0.174 | 0.176 | 1% | 1.341 | 1.420 | 6% | 2.330 | 2.5 | 7% |
| Dairy Products 3/ | 0.035 | 0.042 | 18% | 0.287 | 0.232 | -19% | 0.445 | N/A | NA |
| Unmanufactured Tobacco | 0.018 | 0.020 | 11% | 0.147 | 0.160 | 9% | 0.218 | N/A | NA |
| Cotton & Linters | 0.133 | 0.167 | 26% | 1.419 | 1.073 | -24% | 1.703 | 1.6 | -6% |
| Planting Seeds | 0.059 | 0.120 | 105% | 0.414 | 0.858 | 107% | 0.665 | N/A | NA |
| Horticultural Products 3/ | 0.609 | 0.651 | 7% | 4.199 | 4.332 | 3% | 7.139 | 7.5 | 5% |
| Sugar & Tropical Products 3/ | 0.101 | 0.091 | -10% | 0.634 | 0.671 | 6% | 1.137 | N/A | NA |
| Total Agriculture 3/ | 13.083 | 11.610 | -11% | 101.750 | 94.942 | -7% | 158.371 | 145.4 | -8% |

Notes: 1/ Includes pulses, corn gluten feed and meal; 2/ includes corn, oats, barley, rye and sorghum; 3/ includes only those items measured in metric tons; 4/ items not included in agricultural product totals. N/A = not available.

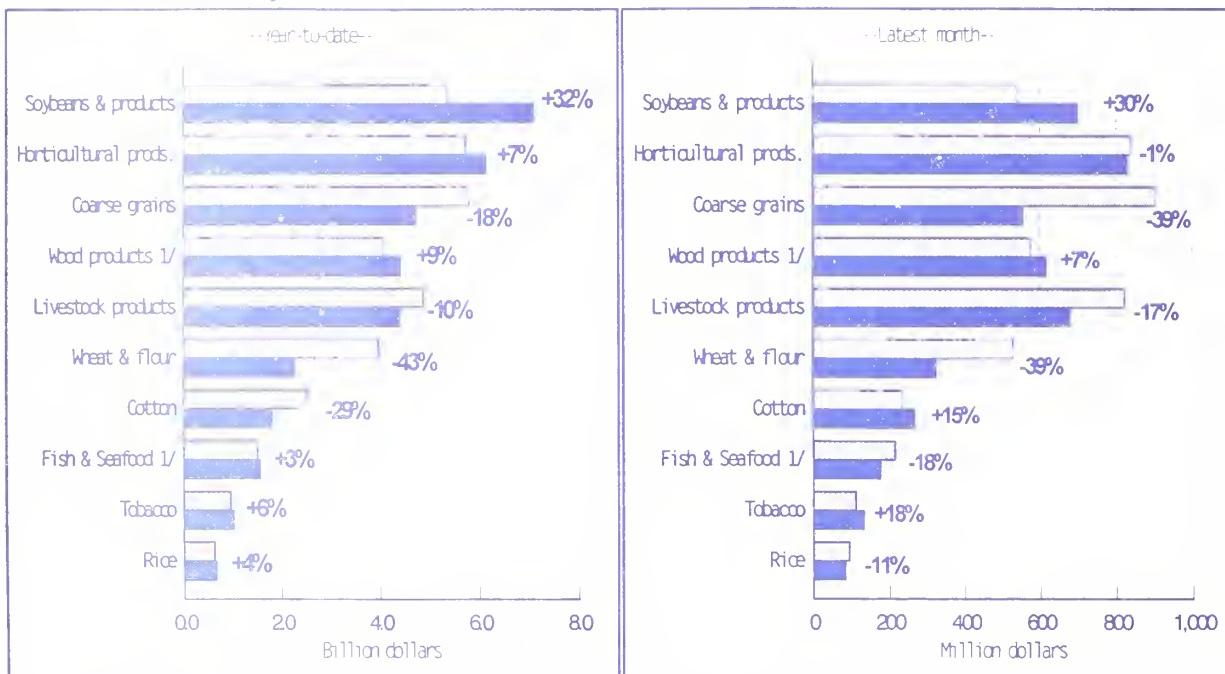
FY 1997 forecasts (f) are based on USDA's "Outlook for Agricultural Exports," published May 29, 1997.

U.S. Agricultural, Fish, and Wood Export Summaries

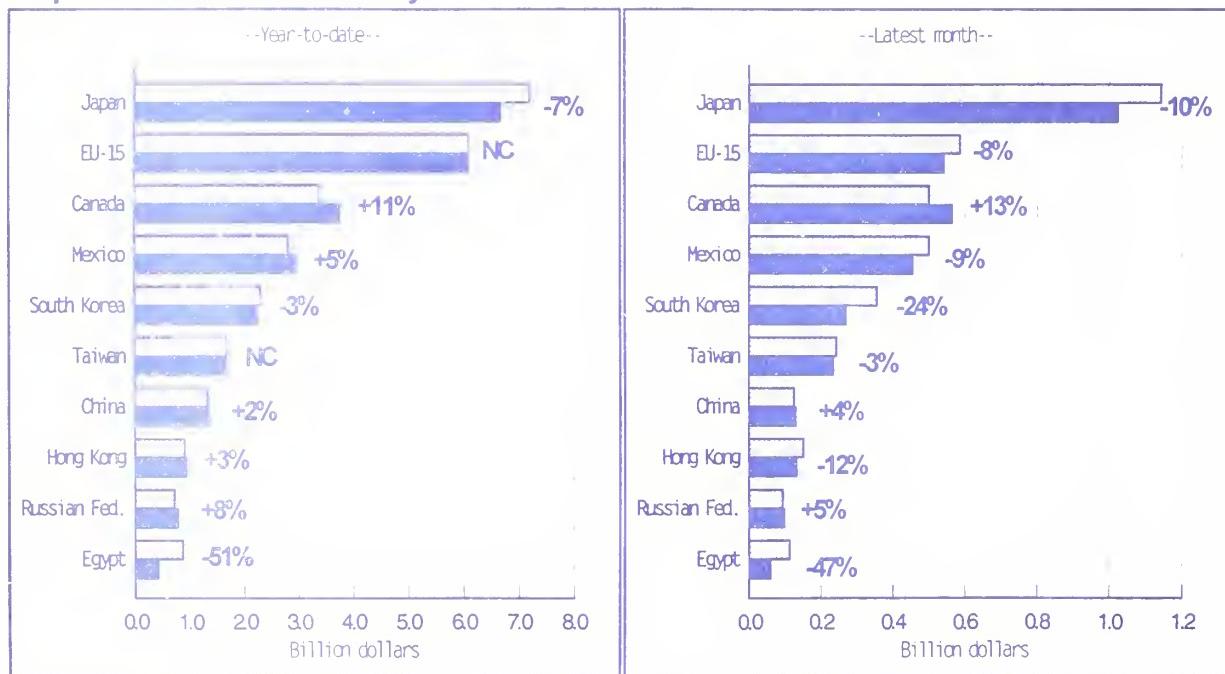
October-April and Latest Month Comparisons

FY 96 ■ FY 97

Product Summary



Top Ten Markets Summary

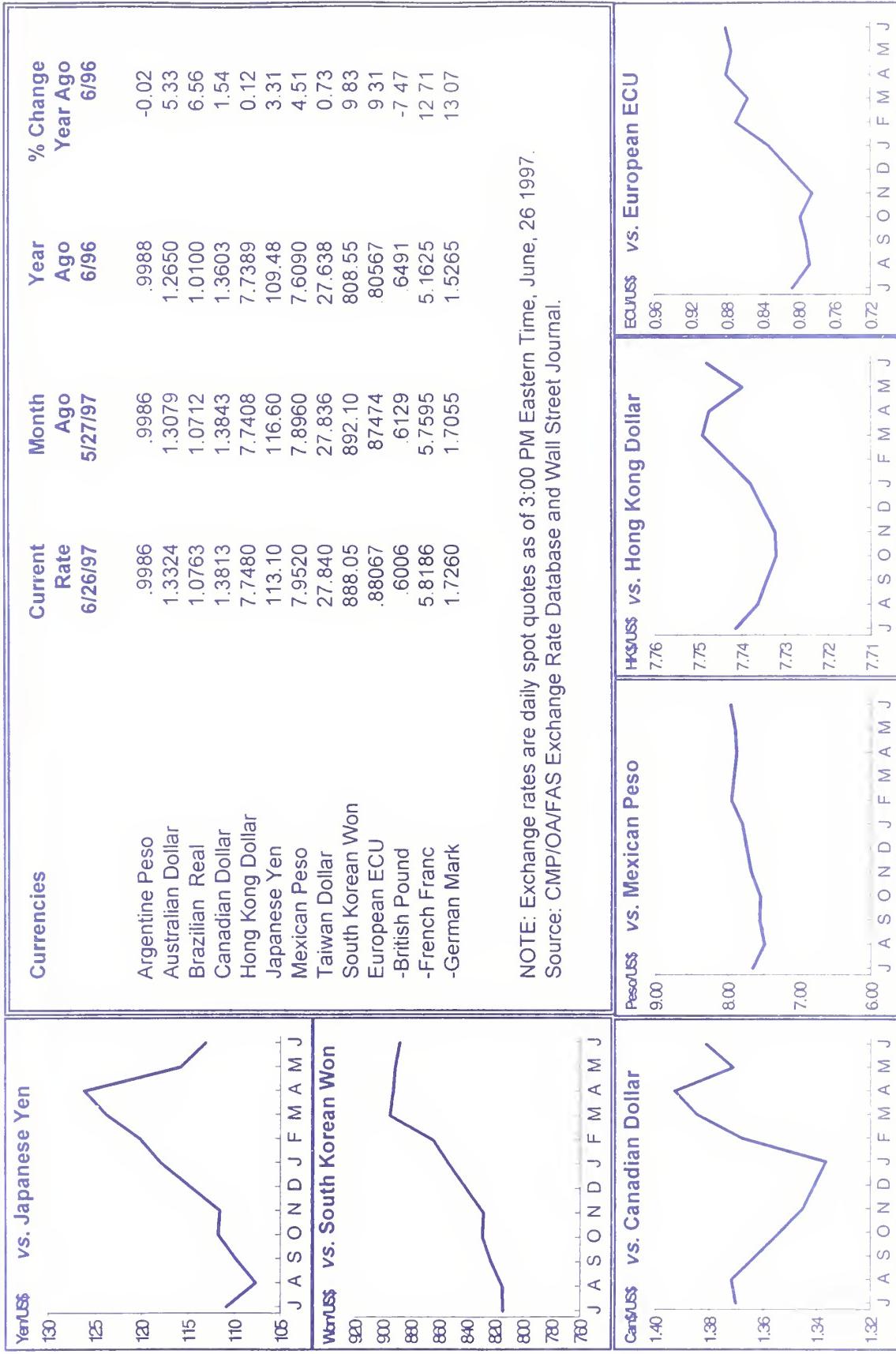


Note: Percentages are computed as the change from a year ago.

1/ Not included in agricultural totals.

Value Of U.S. Dollar Against Major World Currencies

Daily Spot Quotations & Monthly Averages



USDA Trade Show Calendar

Food & Hotel China

August 26-29, 1997

Shanghai, China

- Number of visitors: 13,426

An international show attracting exhibitors from 30 countries and thousands of high quality buyers from many provinces of China.

Ellen Wong
Commerce Tours Int'l

870 Market Street, Suite 920
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

USDA Contact:

Heather Grell
Tel: 202-205-3771
Fax: 202-690-4374
E-mail: grell@fas.usda.gov

SIAL Mercosur

August 26-29, 1997

Buenos Aires, Argentina
Municipal Exhibition Center

- A first-time show-targeting Mercosur, the unified market of Brazil, Argentina, Paraguay and Uruguay, representing 200 million potential consumers.

Julie Halas
IMEX Management, Inc.
6525 Morrison Boulevard, Suite 402
Charlotte, NC 28211 USA
Tel: (704) 365-0041
Fax: (704) 365-8426

USDA Contact:

Karl Hampton
Tel: (202) 690-0188
Fax: (202) 690-4374
E-mail: hampton@fas.usda.gov

Fine Food '97

September 7-10, 1997

Sydney, Australia
Exhibition Center

Australian Exhibition Services Pty. Ltd.
Illoura Plaza, 424 St. Kilda Road
Melbourne, Victoria 3004
Tel: 011-03-98674500
Fax: 011-03-98677981

Ellen Wong
Commerce Tours Int'l
870 Market Street, Suite 920
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

USDA Contact:

Gary Fountain
Tel: 202-720-7417
Fax: 202-690-4374
E-mail: fountain@fas.usda.gov

POLAGRA '97

October 2-7, 1997

Poznan, Poland

- Number of visitors: 232,000
With a rapid growing economy and population of 40 million, Poland constitutes one of the largest and most dynamic markets in Central Europe.

Agricultural Office/American Embassy
Al. Ujazdowskie 29/31
00-540 Warsaw, Poland
Tel: 011-4822-621-3926
Fax: 011-4822-628-1172

USDA Contact:

Maria Nemeth-Ek
Tel: 202-720-3623
Fax: 202-690-4374
E-mail: nemeth@fas.usda.gov

...Trade Show Calendar

ANUGA '97*

October 11-16, 1997
Cologne, Germany

- Number of visitors: 350,000
- The largest show in the world for the promotion of food and beverage products.

Teresina M. Leslie
USDA Foreign Agricultural Service
Room 4646-South Building
14th Street & Independence Avenue, S.W.
Washington, DC 20250-1052
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

DIETEXPO '97

October 18-20, 1997
Paris, France

- Number of visitors: 8,000
- Dietexpo '97 brings together more than 300 natural/health food exhibitors, from all over the world.

Office of Agricultural Affairs
American Embassy
2, avenue Gabriel-75382 Paris Cedex 08, France
Tel: (33-1) 43 12 2245/2264
Fax: (33-1) 43 12 2662
E-mail: 106112.374@compuserve.com
Home Page: <http://www.usia.gov/posts/paris.html>

Mrs. Liz Hitchcock
Reed Exhibition Companies
International Sales
383 Main Avenue
Norfolk, CT 06851

USDA Contact:

Heather Grell
Tel: 202-205-3771
Fax: 202-690-4374
E-mail: grell@fas.usda.gov

Tallinn Food Show '97

November 4-6, 1997
Pirita Fairs Center
Tallinn, Estonia

- Number of visitors: 18,000
- Tallinn is also a "gateway" for trade with Russia (particularly St. Petersburg and Moscow) and the Ukraine.

Jolanta Andersonne
American Embassy, Raina
Blvd. 7, LV-1510
Riga, Latvia
Tel: 011-371-7-210-006
Fax: 011-371-7-227-390
E-mail: agriga@usdal.sprint.com

USDA Contact:

Chin-Zen Lin Plotner
Tel: 202-720-5138
Fax: 202-690-0193
E-mail: plotner@fas.usda.gov

Vietnam Food & Hospitality Week'97

November 5-8, 1997
Ho Chi Minh City, Vietnam

HIECC
Export Promotion Services Agency
1205, Home Place Office Bldg.
283/62 Sukhumvit 55 Rd.
Bangkok 10110
Tel: 011-662-712-7257
Fax: 011-662-712-7266

Ellen Wong
Commerce Tours Int'l
870 Market Street, Suite 920
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

...Trade Show Calendar

USDA Contact:

Tobitha Jones
Tel: 202-690-1182
Fax: 202-690-4374
E-mail: joneste@fas.usda.gov

Food & Hotel Philippines

February 18-21, 1998
Manila, Philippines

- The Philippines continues to emerge as one of the brightest prospects in Asia for growth in U.S. consumer-oriented foods exports.

Ellen Wong
Commerce Tours International
870 Market Street, Suite 920
San Francisco, CA 94102
Tel: 415-433-3072
Fax: 415-433-2820

USDA Contact:

Tobitha Jones
Tel: 202-690-1182
Fax: 202-690-4374
E-mail: joneste@fas.usda.gov

MEFEX '98

February 28-March 3, 1998
Bahrain Int'l Exhibition Center
Manama, Bahrain

- Number of visitors: 5,126
MEFEX is the Middle East longest running show at the heart of the US \$8 billion Gulf Cooperation Council food and beverage market.

Russell Hood
IMEX Management
6525 Morrison Boulevard, Suite 402
Charlotte, NC 28211
Tel: (704) 365-0041
Fax: (704) 365-8426

USDA Contact:

Gary Fountain
Tel: 202-720-7417
Fax: 202-690-4374
E-mail: fountain@fas.usda.gov

Foodex Japan '98

March 10-13, 1998
Nippon Convention Center (Makuhari Messe)
Tokyo, Japan

- Number of visitors: 87,716
An essential and comprehensive stop for any business entering Japan's market.

Japan Management Association
3-1-22, Shibakoen Minato-Ku
Tokyo, Japan
Tel: 011-03-3434-0093
Fax: 011-03-3434-8076

USDA Contact:

Maria Nemeth-Ek
Tel: 202-720-3623
Fax: 202-690-4374
E-mail: nemeth@fas.usda.gov

Great American Food Show-Korea*

March 17-19, 1998
Seoul, Korea

- Number of visitors: 3,500

Philip A. Shull
Agricultural Trade Office-Seoul
82 Sejong-Ro, Chongro-Ku
Seoul, Korea 110-050
Tel: 011-822-397-4297
Fax: 011-822-738-7147

USDA Contact:

Teresina Leslie
Tel: 202-720-9423
Fax: 202-690-4374
E-mail: leslie@fas.usda.gov

...Trade Show Calendar

Food & Hotel Asia '98

April 14-17, 1998

World Trade Centre

Singapore, Singapore

Recommendation is based on market potential and commitment of USDA staff in the overseas posts. USDA staff overseas provides most of the related services.

- Number of visitors: 36,000

Food & Hotel Asia is the largest show held in Southeast Asia. It attracts buyers from Malaysia, Indonesia, Thailand, and the Philippines.

Ellen Wong

Commerce Tours International, Inc.

870 Market Street, Suite 918

San Francisco, CA 94102

Tel: (415) 433-3072

Fax: (415) 433-2820

USDA Contact:

Teresina Leslie

Tel: 202-720-9423

Fax: 202-690-4374

E-mail: leslie@fas.usda.gov

*USDA Sponsored Shows:

USDA is involved in all aspects of show management and provides related services, including:

Assistance in sample product shipment, rental of floor space, booth design/layout, and marketing the show to potential exhibitors (primarily via mass mailing, invitations to special events, printing show directory) and hotel reservations for show participants.

USDA staff from Washington and the local U.S. Embassy provide support to exhibitors.

USDA Endorsed Shows:

USDA recommends these as best avenues to enter prospective market for consumer-oriented foods, and provides limited services related to these shows, including:

Marketing, mailing advertising material, referral to show organizer, setting up information booth or national pavilion, pre-show promotion, invitation of potential buyers.

What Every Exporter Should Know

An informative audio cassette kit, including the Foreign Agricultural Service's Food and Agricultural Export Directory



In this 6 hour cassette program, you'll learn how to:

- decide if your firm is ready to export.
- assess your product's export potential.
- select a sales strategy.
- reach buyers overseas.
- find the right person to distribute your product.
- customize your product for foreign consumers.
- test your product and your packaging.
- find out about foreign import rules and regulations.
- get information and help with shipping.

- make sure you get paid.
- showcase your product at international events.
- tailor your sales approach to the customs of the marketplace.
- tap into Federal and State programs and services that can help you compete more effectively.

Plus, you'll learn scores of tips on how to improve your sales prospects, avoid mistakes, and build lasting relationships with buyers overseas.

Order Now. The price
is only **\$50!**

Quantity _____ kits @ \$50.00 each
Total: \$ _____

Outside U.S.
Quantity _____ kits @ \$65.00 each.
Total \$ _____

Check/money order for \$ _____ enclosed
Make checks payable to: Foreign Agricultural Service

NO REFUNDS MAY BE MADE

Mail your order to:

U.S. Department of Agriculture
Foreign Agricultural Service
Information Division
Ag Box 1006
Washington, D.C. 20250-1006

Signature: _____

Please send to:

Name _____

Company _____

Address _____

City _____

State _____ Zip _____

NTIS Order Form For FAS Subscriptions

U.S. DEPARTMENT OF COMMERCE
Technology Administration
National Technical Information Service
Springfield, VA 22161

To order subscriptions, call (703) 487-4630.
TDD (For hearing impaired only), call (703) 487-4639.

Please PRINT or TYPE

SHIP TO ADDRESS

| | | |
|-----------------------------------|---------------------------|----------|
| CUSTOMER MASTER NUMBER (IF KNOWN) | | DATE |
| ATTENTION/NAME | | |
| ORGANIZATION | DIVISION / ROOM NUMBER | |
| STREET ADDRESS | | |
| CITY | STATE | ZIP CODE |
| PROVINCE / TERRITORY | INTERNATIONAL POSTAL CODE | |
| COUNTRY | | |
| PHONE NUMBER () | FAX NUMBER () | |
| CONTACT NAME | INTERNET E-MAIL ADDRESS | |



(703) 487-4630
or fax this form to (703) 321-9467

To verify receipt of your fax order, call (703) 487-4630.

METHOD OF PAYMENT

| | | |
|--|-------------------------------------|---|
| <input type="checkbox"/> VISA | <input type="checkbox"/> MasterCard | <input type="checkbox"/> American Express |
| CREDIT CARD NUMBER | | EXPIRATION DATE |
| CARDHOLDER'S NAME | | |
| SIGNATURE (REQUIRED TO VALIDATE ALL ORDERS) | | |
| <input type="checkbox"/> Check/Money Order enclosed for \$ | | (PAYABLE IN U.S. DOLLARS) |
| <input type="checkbox"/> NTIS Deposit Account Number: | | |

RETURN POLICY

Although NTIS cannot accept returns for credit or refund, we will gladly replace any item you requested if we made an error in filling your order, if the item was defective, or if you receive it in damaged condition. Just call our Subscription Department at (703) 487-4630.

SINGLE COPIES

To order single copies, call our Sales Desk at (703) 487-4650. Order via the Internet: orders@ntis.fedworld.gov. RUSH Service is available for an additional fee. Call 1-800-553-NTIS.

| NO. OF SUBSCRIPTIONS | ORDER NO. | TITLES | PRICES* | | |
|-------------------------|------------|---|----------|---------------|-------|
| | | | DOMESTIC | INTERNATIONAL | TOTAL |
| | SUB9706LJX | Agricultural Trade Highlights (12 issues) | \$ 65.00 | \$ 110.00 | |
| | SUB9707LJX | Tropical Products (Coffee, Cocoa, Spices, Essentials Oils) (4 issues) | 30.00 | 60.00 | |
| | SUB9708LJX | Cotton: World Markets & Trade (12 issues) | 75.00 | 142.00 | |
| | SUB9709LJX | Dairy, Livestock & Poultry: U.S. Trade & Prospects (12 issues) | 98.00 | 214.00 | |
| | SUB9710LJX | Dairy Monthly Imports (12 issues) | 65.00 | 110.00 | |
| | SUB9711LJX | Livestock & Poultry: World Markets & Trade (2 issues) | 21.00 | 42.00 | |
| | SUB9739LJX | Dairy: World Markets & Trade (2 issues) | 21.00 | 42.00 | |
| | SUB9712LJX | All 28 Dairy, Livestock & Poultry reports | 170.00 | 356.00 | |
| | SUB9713LJX | Grain: World Markets & Trade (12 issues) | 90.00 | 180.00 | |
| | SUB9714LJX | World Horticultural Trade & U.S. Export Opportunities (12 issues) | 90.00 | 180.00 | |
| | SUB9715LJX | Oilseeds: World Markets & Trade (12 issues) | 98.00 | 196.00 | |
| | SUB9716LJX | U.S. Planting Seed Trade (13 issues) | 55.00 | 115.00 | |
| | SUB9717LJX | Sugar: World Markets & Trade (2 issues) | 25.00 | 50.00 | |
| | SUB9718LJX | Tobacco: World Markets & Trade (12 issues) | 80.00 | 182.00 | |
| | SUB9719LJX | World Agricultural Production (12 issues) | 95.00 | 160.00 | |
| | SUB9734LJX | Wood Products: International Trade & Foreign Markets (5 issues) | 55.00 | 118.00 | |
| | SUB9735LJX | Monthly Summary of Export Credit Guarantee Program Activity (12 issues) | 70.00 | 120.00 | |
| | SUB9736LJX | U.S. Export Sales (52 issues) | 175.00 | 320.00 | |
| | SUB9737LJX | AgExporter Magazine (12 issues) | 51.00 | 59.00 | |

Also available — these special one-time reports

| | | | | |
|----------------|---|---------|---------|--|
| PB96-136403LJX | Food & Agricultural Export Directory | \$19.50 | \$39.00 | |
| PB96-196787LJX | World Horticultural Trade & U.S. Export Opportunities (Supp. 1-Exports) | 21.50 | 43.00 | |
| PB96-196795LJX | World Horticultural Trade & U.S. Export Opportunities (Supp. 2-Imports) | 25.00 | 50.00 | |
| PB96-196761LJX | A Guide to Exporting: Solid Wood Products | 28.00 | 56.00 | |
| PB88-240296LJX | Dictionary of International Agricultural Trade (1988 ed.) | 31.50 | 53.00 | |

Prices are subject to change.

The NTIS Subscription Dept. (703) 487-4630 can provide pricing verification.

* Prices include first-class delivery or equivalent service for domestic (U.S., Canada, and Mexico); airmail delivery for international (all other countries).

GRAND TOTAL

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
1400 INDEPENDENCE AVENUE, SW
WASHINGTON, DC 20250-1004

For questions concerning your subscription or change of address,
PRINT OR TYPE the new address, including ZIP code and return this
sheet to:

U. S. DEPARTMENT OF COMMERCE
TECHNOLOGY ADMINISTRATION
NATIONAL TECHNICAL INFORMATION SERVICE
SPRINGFIELD, VA 22161

For questions or concerns on the data included in this publication,
contact us at the address shown above.



Summaries and selected tables from many Foreign Agricultural Service world market and trade reports are available electronically. The reports include U.S. Export Sales (available electronically after 8:30 a.m. on release day); Grain: World Markets and Trade; Oilseeds: World Markets and Trade; Cotton: World Markets and Trade; Tobacco: World Markets and Trade; World Agricultural Production; the early release version of World Horticultural Products and U.S. Export Opportunities; and Tropical Products: World Markets and Trade (all available electronically after 3:00 p.m. Washington DC time on release day) as well as Sugar: World Markets and Trade; Livestock and Poultry: World Markets and Trade; Dairy: World Markets and Trade, and U.S. Planting Seed Trade (available within a week after release.)

You can read the reports on the FAS home page (<http://www.fas.usda.gov>). The reports remain "current" until the succeeding issue is available. Older issues are available in the archives section of the home page. We also make selected cover articles and graphics available from these publications, in a separate section of the site. Reports are also available from the Economic Bulletin Board at Stat-USA, on the same schedule. For more information, you may contact Stat-USA at (202) 482-1986 (Monday-Friday, 8:30-5:30 p.m. Washington, DC time.)

For more information on the FAS home page, contact Glenn Kaup, tel. (202) 720-3329; fax. (202) 720-3229; or via e-mail kaup@fas.usda.gov

The U.S. Department of Agriculture (USDA) prohibits discrimination in its programs on the basis of race, color, national origin, sex, religion, age, disability, political beliefs, and marital or familial status. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's TARGET Center at 202-720-2600 (voice and TDD).

To file a complaint, write the Secretary of Agriculture, U.S. Department of Agriculture, Washington, DC 20250, or call 1-800-245-6340 (voice) or (202) 720-1127 (TDD). USDA is an equal employment opportunity employer.